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ABSTRACT

Types of research currently being used in negotiating salaries and fringe benefits for faculty are discussed. As collective bargaining becomes more widespread among public colleges and universities it is suggested that the institutional researcher will be called upon to provide research relevant to the arbitration process. Master contract language, PERB laws, need arguments, and other tools common to professional labor organizations are discussed. Examples of research techniques used by various groups, states, and countries are provided for selected boards of regents and offices of institutional research: the countries of France, Ireland, and Canada: as well as the National Educational Association, American Association of University Professors, and American Federation of Teachers. The arguments from these examples focus around need, comparability, and ability to pay. Brief narratives accompany the examples explaining the relevance of each, the assumptions upon which they are based, and the associated pitfalls. (Author/SF)

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West Virginia University

Office of Institutional Research

A COMPARISON OF RESEARCH TECHNIQUES USED IN THE COLLECTIVE BARGAINING PROCESS

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PRESENTED AT:

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ABSTRACT

As collective bargaining becomes more widespread among public colleges and universities in this country, the institutional researcher will be called upon to provide research relevant to arbitration between faculty and administration. Thus, the institutional researcher will need to become familiar with master contract language, PERB laws, need arguments and other tools common to professional labor organizations.

This research will focus upon the types of research that are currently being used in negotiating salaries and fringe benefits for faculty. Material for this study will be gathered from selected boards of regents, offices of institutional research, and various teacher and faculty organizations. Critical analysis will be based around these themes: *Need, Comparability, and Ability to Pay.*

INTRODUCTION

Whereas there is no one method used in preparation for impasse proceedings (i.e., fact-findings and final offer arbitration), there are certain general themes or concepts that permeate the negotiations process regardless of the issues; personalities; or, public employment laws. In all instances, nothing can replace accurate, timely research and skillful preparation in the decision making process leading up to impasse proceedings.

The material herein offers samples of what research can be done once the decision to go to impasse has been reached. Following a brief section on Iowa PERB laws, examples of exhibits used in Iowa Public Schools, as well as, brief narratives explaining their relevance are provided.

Researchers should be cautioned that fact-finders do not search out facts; but, rather they rely on the parties to provide them with information upon which to base a decision. It is not uncommon for an arbitrator or fact-finder to not ask any questions during a hearing-except for clarification.

THE LAW and PERB RULES AND REGULATIONS
for FACT-FINDING

The Law

Section 21 of the Iowa Public Employment Relations Act (Chapter 20 of Iowa Code) provides for fact-finding as the second step of the impasse procedure.

FACT-FINDING. If the impasse persists ten days after the mediator has been appointed, the board shall appoint a fact-finder representative of the public, from a list of qualified persons maintained by the board. The fact-finder shall conduct a hearing, may administer oaths, and may request the board to issue subpoenas. The fact-finder shall make written findings of facts and recommendations for resolution of the dispute and, not later than fifteen days from the day of appointment, shall serve such findings on the public employer and the certified employee organization.

The public employer and the certified employee organization shall immediately accept the fact-finder's recommendation or shall within five days submit the fact-finder's recommendations to the governing body and members of the certified employee organization for acceptance or rejection. If the dispute continues ten days after the report is submitted, the report shall be made public by the board.

PERB Rules and Regulations

Chapter 7.4 (2) of the PERB Rules and Regulations expands on the procedures as follows:

7.4(1) Appointment of fact-finder. Upon notification by the mediator that the dispute remains unresolved, the director shall appoint a fact-finder. Where the parties and the mediator agree, the director shall appoint the mediator to serve as fact-finder.

7.4(2) Powers of the fact-finder. The fact-finder shall have the power to conduct a hearing, administer oaths and request the board to issue subpoenas. The subject of fact-finding shall be the impasse items unresolved by mediation. By mutual agreement, the fact-finder may also assist the parties in negotiating a settlement.

7.4(3) Notice of hearing and exchange of proposal. The appointment of the fact-finder shall be effective the date of the commencement of the fact-finding hearing. The director or fact-finder shall establish the time, place and date of hearing and shall notify the parties of the same. The parties shall exchange copies of all proposals to be presented to the fact-finder at least five days prior to the commencement of a fact-finding hearing; provided, however, that the parties may continue to bargain and nothing in this section shall be deemed to preclude a party from making a concession or amending its proposals in the course of further bargaining. No party shall present a proposal to the fact-finder which has not been offered to the other party in the course of negotiations.

7.4(4) Briefs and statements. The fact-finder may require the parties to submit a brief or a statement on the unresolved impasse items.

7.4(5) Hearing. A fact-finding hearing shall be limited to matters which will enable the fact-finder to make recommendations for settlement of the dispute.

7.4(6) Report of the fact-finder. Within fifteen days of appointment, the fact-finder shall issue to the parties a "Report of Fact-Finder" consisting of specific findings of fact concerning each impasse item, and separate therefrom specific recommendations for resolution of each impasse item. In addition, the report shall recite the impasse items resolved by the parties during fact-finding and withdrawn from further impasse procedures. The report shall also identify the parties and their representatives and recite the time, date, place and duration of hearing sessions. The fact-finder shall serve a copy of the report to the parties and file the original with the director.

7.4(7) Action on fact-finder's report. Upon receipt of the fact-finder's report, the public employer and the certified employee organization shall immediately accept the fact-finder's recommendations or shall within five days submit the fact-finder's recommendations to the governing body and members of the certified employee organization for acceptance or rejection. "Immediately" shall mean a period of not longer than seventy-two hours from said receipt. Notice to members of the employee organization shall be as provided in 6.4(20).

> 6.4(20) Acceptance of proposed agreement. Where the parties have in good faith reached agreement on a proposed collective bargaining agreement, the employee organization shall give reasonable notice of the date, time and place of a ratification election on the proposed agreement to the public employees, provided, however, that such notice shall be at least twenty-four hours prior to said election. In no event shall the ratification election be held later than ten days after the reaching of agreement. The vote shall be by secret ballot and only members of the employee organization shall be entitled to vote. If a majority of those voting ratify the proposed agreement, the employee organization shall notify the public employer. The public employer shall then, and not prior, make public the terms of the collective bargaining agreement at least twenty-four hours prior to acceptance or rejection of the proposed agreement, by the governing body.

7.4(8) Publication of report by board. If the public employer and the employee organization have failed to conclude a collective bargaining agreement ten days after their receipt of the fact-finder's report and recommendations, the board shall make public the fact-finder's report and recommendations.

7.4(9) Cost of fact-finding. The fact-finder shall submit to the parties a written statement of his fee and expenses with a copy thereof to the director. The parties shall share the costs of fact-finding equally.

THE LAW and PERB RULES AND REGULATIONS
for ARBITRATION

The Law

SEC. 22. NEW SECTION. Binding Arbitration

1. If an impasse persists after the findings of fact and recommendations are made public by the fact-finder, the parties may continue to negotiate or, the board shall have the power, upon request of either party, to arrange for arbitration, which shall be binding. The request for arbitration shall be in writing and a copy of the request shall be served upon the other party.

2. Each party shall submit to the board within four days of request a final offer on the impasse items with proof of service of a copy upon the other party. Each party shall also submit a copy of a draft of the proposed collective bargaining agreement to the extent to which agreement has been reached and the name of its selected arbitrator. The parties may continue to negotiate all offers until an agreement is reached or a decision rendered by the panel of arbitrators.

As an alternative procedure, the two parties may agree to submit the dispute to a single arbitrator. If the parties cannot agree on the arbitrator within four days, the selection shall be made pursuant to subsection five (5) of this section. The full costs of arbitration under this provision shall be shared equally by the parties to the dispute.

3. The submission of the impasse items to the arbitrators shall be limited to those issues that had been considered by the fact-finder and upon which the parties have not reached agreement. With respect to each such item, the arbitration board award shall be restricted to the final offers on each impasse item submitted by the parties to the arbitration board or to the recommendation of the fact-finder on each impasse item.

4. The panel of arbitrators shall consist of three members appointed in the following manner:

a. One member shall be appointed by the public employer.

b. One member shall be appointed by the employee organization.

c. One member shall be appointed mutually by the members appointed by the public employer and the employee organization. The last member appointed shall be the chairman of the panel of arbitrators. No member appointed shall be an employee of the parties.

d. The public employer and employee organization shall each pay the fees and expenses of the chairman of the panel and all other costs of arbitration shall be shared equally.

5. If the third member has not been selected within four days of notification as provided in subsection two (2) of this section, a list of three arbitrators shall be submitted to the parties by the board. The two arbitrators selected by the public employer and the employee organization shall determine by lot which arbitrator shall remove the first name from the list submitted by the board. The arbitrator having the right to remove the first name shall do so within two days and the second arbitrator shall have one additional day to remove one of the two remaining names. The person whose name remains shall become the chairman of the panel of arbitrators and shall call a meeting within ten days at a location designated by him.

6. If a vacancy should occur on the panel of arbitrators, the selection for replacement of such member shall be in the same manner and within the same time limits as the original member was chosen. No final selection under subsection nine (9) of this section shall be made by the board until the vacancy has been filled.

7. The panel of arbitrators shall at no time engage in an effort to mediate or otherwise settle the dispute in any manner other than that prescribed in this section.

8. From the time of appointment until such time as the panel of arbitrators makes its final determination, there shall be no discussion concerning recommendations for settlement of the dispute by the members of the panel of arbitrators with parties other than those who are direct parties to the dispute. The panel of arbitrators may conduct formal or informal hearings to discuss offers submitted by both parties.

9. The panel of arbitrators shall consider, in addition to any other relevant factors, the following factors:

a. Past collective bargaining contracts between the parties including the bargaining that led up to such contracts.

b. Comparison of wages, hours and conditions of employment of the involved public employees with those of other public employees doing comparable work, giving consideration to factors peculiar to the area and the classifications involved.

c. The interests and welfare of the public, the ability of the public employer to finance economic adjustments and the effect of such adjustments on the normal standard of services.

d. The power of the public employer to levy taxes and appropriate funds for the conduct of its operations.

10. The chairman of the panel of arbitrators may hold hearings and administer oaths, examine witnesses and documents, take testimony and receive evidence, issue subpoenas to compel the attendance of witnesses and the production of records, and delegate such powers to other members of the panel of arbitrators. The chairman of the panel of arbitrators may petition the district court at the seat of government or of the county in which any hearing is held to enforce the order of the chairman compelling the attendance of witnesses and the production of records.

11. A majority of the panel of arbitrators shall select within fifteen days after its first meeting the most reasonable offer, in its judgment, of the final offers on each impasse item submitted by the parties, or the recommendations of the fact-finder on each impasse item.

12. The selections by the panel of arbitrators and items agreed upon by the public employer and the employee organization, shall be deemed to be the collective bargaining agreement between the parties.

13. The determination of the panel of arbitrators shall be by majority vote and shall be final and binding subject to the provisions of section seventeen (17), subsection six (6), of this Act. The panel of arbitrators shall give written explanation for its selection and inform the parties of its decision.

From PERB Rules and Regulations

660-7.5(20) Binding Arbitration

7.5(1) Request for arbitration. At any time following the making public by the board of the fact-finder's report and recommendations, either party to an impasse may request the board to initiate binding arbitration.

7.5(2) Form and contents of request. The request for arbitration shall be in writing and shall include the name, address and signature of the requesting party and the capacity in which acting.

7.5(3) Service of request. The requesting party shall serve a copy of the request for arbitration upon the opposing party by ordinary mail.

7.5(4) Preliminary information. Within four days of the filing of the request with the board for arbitration, each party shall submit to the board the following information:

a. Two copies of the final offer of the party on each impasse item.

b. Two copies of the agreed upon provisions of the proposed collective bargaining agreement.

c. The name of the parties' selected arbitrator, or name of a single arbitrator where the parties agree to submit the dispute to a single arbitrator.

d. Certificate of service upon the opposing party of items "a" and "c" above.

7.5(5) Selection of chairperson. Within eight days of the filing of the request for arbitration, the arbitrators selected by each party shall attempt to agree upon the selection of a third person to act as chairperson of the arbitration panel. If the parties to the impasse fail to agree upon an arbitration chairperson within the time allotted under this rule, the director shall submit a list of three persons who have agreed to act as arbitration chairperson to the parties. The parties shall then select the arbitration chairperson from the list as provided by the Act.

7.5(6) Conduct of hearings. Arbitration hearings shall be open to the public. The arbitration hearing shall be limited to those factors listed in section 22.9 of the Act and such other relevant factors as may enable the arbitration panel to select the fact-finder's recommendation or the final offer of either party for each impasse item. Arbitrators appointed pursuant to impasse procedures agreed upon by the parties shall likewise consider the factors listed in section 22.9 of the Act.

7.5(7) Continued bargaining. The parties may continue to bargain on the impasse items before the arbitration panel until such time as the arbitration panel announces its decision. Should the parties reach agreement on an impasse item, they shall immediately report their agreement to the arbitration panel. The arbitration panel shall add the agreed upon term to the collective bargining contract and shall no longer consider the final offers of the parties or the fact-finder's recommendation on that impasse item.

7.5(8) Report of the arbitration panel. Within fifteen days after its first meeting, the arbitration panel shall announce its decision pursuant to the Act. The panel shall serve each party and the director with a copy of its decision.

ORDER OF EVENTS IN A FACT-FINDING HEARING

1. Opening of hearing commences with an introductory statement by the fact-finder for the record.

2. Introduction of parties (official representatives of each party) fact-finder may ask each party for a list of the witnesses planned to be called.

3. Stipulation of facts and/or joint exhibits. (An example of a joint exhibit might be the previous year's agreement.)

4. Opening statement by the initiating party. (Association often goes first) followed by a similar statement by other side.

5. Presentation of evidence and witnesses by initiating party. (Witnesses sworn or affirmed.)

6. Cross-examination by the opposing party. (Takes place as each witness completes direct testimony followed by questions by fact-finder, if any.)

7. Presentation of evidence and witnesses by opposing party. (Witnesses sworn or affirmed.)

8. Cross-examination by initiating party.

9. Closing or summary statement by opposing party.

10. Closing or summary statement by opposing party.

11. Decision about post-hearing briefs. (Opportunity to file generally afforded both parties -- date for filing agreed upon.)

12. Closing remarks by fact-finder.

13. Receipt of the recommendations by the parties.

14. Acceptance or rejection of the recommendations by the two parties.

15. Incorporation of fact-finding recommendation into agreement, escalation of pressure for possible further bargaining or movement to arbitration.

KINDS OF EVIDENCE

For purposes of this handbook, we have divided the kinds of evidence and exhibits into three categories, i.e., Need, Comparability, and Ability to Pay. Certainly other kinds of arguments could be advanced that don't necessarily fall into one of these categories. For example, the effect of past practice in terms of retaining or changing contract language cannot be overlooked.

N E E D

Although all neutrals do not give the same weight to evidence or to the same criteria in reaching a decision, it appears that the party proposing to change existing contract language will be required to show need. The longer the language remains in the contract, the harder it may be to change it. Therefore, locals wanting to improve their language will have the burden of showing how the language has been a problem, how the harmonious relationship between employer and employee is hurt by it, or how the language has not worked. One way of showing need is to provide evidence of the grievance activity it has created. At any rate, this same burden is placed on any employer wishing to change existing contract language.

During the first three years of impasse, our "Need" exhibits have been largely limited to cost-of-living data or testimony of teachers denied transfer for four straight years, etc. However, Need arguments and exhibits will play a larger role in future hearings, simply because neutrals don't like to change existing contract language when it hasn't been tested or hasn't caused a problem. The longer we tolerate bad language in the contract, the tougher it will be to change language before the neutrals.

ASSOCIATION EXHIBIT _____

TAKE HOME PAY ILLUSTRATION

A teacher moving from step #14 to step #15 (maximum) on the MA training lane would receive an additional $666 (4.27%) under the District's offer of a $9500 base on the current schedule.

ADDITIONAL DEDUCTIONS

Additional FICA @ 5.85%	$ 38.96
Additional IPERS @ 3.5%	23.98
Estimated 25% increase in dependent health	105.15
State/Federal Income Taxes @ 20%	133.20
Total additional deductions	$301.29

Conclusion: 45% of the teacher's $666 increase would be absorbed in deductions, reducing the increase to $364.71 take-home pay.

The same teacher would get $1179 (7.57%) increase under the Association's proposal. From the increase, the teacher would receive $726.63 take-home pay.

The take-home pay under the Association's proposal more realistically allows the teacher to maintain spendable income in an inflationary economy.

12

NSEA Exhibit _____

COMPARISON OF CONSUMER PRICE INDEX AND NORTH SCOTT BASE SALARY

Date	Consumer Price Index Increase for 12 month Period	BA Base Actual for Upcoming School Year	BA Base To be Even with 1969 Base	Dollars Lost Since 1969	Purchasing Power Remaining Compared to Aug., 1969
Aug. 1969		$6700			
Aug. 1970	5.6%	$6900	$ 7075	$ 175	97.5%
Aug. 1971	4.45%	$7100	$ 7390	$ 290	95.9%
Aug. 1972	2.9%	$7200	$ 7604	$ 404	94.4%
Aug. 1973	7.5%	$7400	$ 8174	$ 774	89.5%
Aug. 1974	11.0%	$8150	$ 9073	$ 923	88.7%
Aug. 1975	8.6%	$8800	$ 9853	$1053	88.0%
Aug. 1976	5.6%	$9450	$10405	$ 955	89.9%
Aug. 1977	6.6%	$9900	$11092	$1192	88.0%
Aug. 1978	6.6%		$11824		
	Association Proposal	$10,550.			87.9%
	Board Proposal	$10,200.			84.1%

SUMMARY: The purchasing power of North Scott teachers in 1977 was 88% of what it was in 1969. The Association is proposing a BA Base which is less than that justified by the cost of living.

SOURCE: The U.S. Consumer Price Index

NSEA Exhibit _____

Partial list of experienced teachers resigning from North Scott School District

NAME	YEAR	SALARY INDEX	NEW POSITION
Wayne Rogers	1978	1.30	Time Study
Mary Lou Rogers	1978	1.45	
Bill McCoy	1977	1.20	Insurance
Bill Banks	1976	1.90	Laundromat
Arty McIntosh	1976	1.70	Sales
Dick Snyders	1975	1.80	Motel Business
Robert Braunschweig	1974	1.60	Contractor
Don Schmelzer	1974	1.75	Goodyear Dealer
Dick Thompson	1973	1.35	Adminstration
Betty Levsen	1973	1.40	Real Estate

Summary:

Teachers nearing the bottom of the salary schedule many times are forced to leave the profession for financial reasons. Private business has shown to be more rewarding financially. Good experienced teachers need to be retained for quality education.

Association Exhibit _____

MID-PRAIRIE EDUCATION ASSOCIATION RATIONALE

The Mid-Prairie Education Association's proposal reflects past bargaining trends which increased the amount of sick leave accumulation by ten days a year over the past 3-4 years, i.e., 90 to 100, 100 to 110, 110 to 120.

The amount of accumulated sick leave is a major benefit to the teachers in the event of catastrophic illness or accident which would force the employee to be away from work for a prolonged period of time. In addition it affords the distressed employee assurance that, while injured or ill, there will be no lack of income or reduced income during this period of time. Even though insurance programs will aid somewhat, benefits derived from insurance are less than normal.

Evidence shows the need for a larger sum of accumulated sick leave days in that 36 teachers or more than 1/3 of all teachers have accumulated at least 114 days of sick leave apiece*. Coupled with past history of increasing the accumulated sick leave because of the apparent need and usage, the Association position is one of equity and fairness.

*Information received from John McDowell's (Board Secretary) office, individual employee payroll records, February 17, 1976.

CHOOSING A COMPARISON GROUP(S)
and
BUILDING COMPARABILITY

The first step in preparing basic research in bargaining is to identify how the employees that you represent compare with other employees. In order to do this effectively, your team may have to research many more contracts than are finally used as the basis for comparison. Although every neutral may not give the same weight to a particular comparison group, the law does spell out in Section 22 that an arbitrator (and by inference a fact-finder) should compare public employees with

> . . . other public employees doing comparable work, giving consideration to factors peculiar to the area and the classification involved.
> (Sec. 22-9 b)

Certainly cases in Iowa have been presented using the following:

1. Geographical -- i.e., 25-100 mile radius
2. Statewide
3. Athletic Conference
4. Area Education Agency
5. Countrywide
6. Suburban or Urban
7. Increasing Enrollment
8. UniServ Unit Area
9. Enrollment Size categories

The local association must determine which comparison group(s) is best to show that its position has merit. (Most early or pre-bargaining research will have to be updated as new settlement reports are gathered.)

While the local association is developing a comparison group, it is also important to develop a rationale to support the validity of that group. In addition, we should develop a rationale why other groups weren't chosen (particularly those that the Employer will likely use.)

In terms of comparability, there are two good positions to begin. If the local association can find itself at the bottom of the comparison group in most issues, then the argument is that we should be brought up to where everyone else is. If, on the other hand, the association finds itself at or near the top of the comparison group, it can argue that it ought to maintain its relative position. It would even be possible to argue the maintenance of relative position if the local association found itself in the middle, especially if the employer's position would cause an erosion. The worst comparison position would be the middle or average. Experience has shown that it is difficult to argue successfully that the local association should get significant increases in relative position, when the comparison demonstrates a middle ranking.

The importance of comparability demands accuracy from the local negotiations team. Often it is to the local's advantage to secure copies of the actual contracts of the comparison group(s) finally chosen. Copies of contracts can then be used to verify the data on exhibits, when and if the data is challenged during the hearing. The association's credibility can be severely damaged by inaccuracies and the wrong data.

SOURCES FOR SUPPORTIVE DOCUMENTATION AND SUGGESTED EXHIBITS

-- Bureau of Labor Statistics

-- BNA materials

-- Favorable court rulings having appropriate applicability to issue(s)

-- City hall and county courthouses

-- ISEA and NEA research data on economic status of teachers

-- NEA Negotiation Research Digest and Bargaining Quarterly

-- Findings of opinion polls and surveys

-- Consumer Price Index Statistics

-- Newspaper articles and magazine articles

-- Law books

-- School district budget analysis and analysis of budgetary practices

-- Teacher handbooks

-- Other existing agreements containing desired provisions

-- Board policy books

-- Minutes and/or log of bargaining history

-- Local Chamber of Commerce

-- Community groups; PTA's, Tax Payer Interest Groups

-- Service clubs; Lions, Rotarians

-- Comparison groupings; athletic conference, contiguous districts, "X" mile radius districts, cooperative service agencies, county seats, statewide

-- Existing education policies, codes, statutes, which provide for provisions being sought

-- Iowa Department of Labor Statistics

-- Other professional employees' salaries and benefits (outside of teaching)

-- Other district employee contracts and/or conditions of work

-- Favorable arbitration awards or negotiability dispute decisions

-- All tentative agreements

-- Proposals of both parties, especially current proposals

Sources for Supportive Documentation and Suggested Exhibits (Cont'd)

-- Position papers, studies, projects, etc., with conclusions and/or findings favorable to association positions(s)

-- Corroborating witnesses

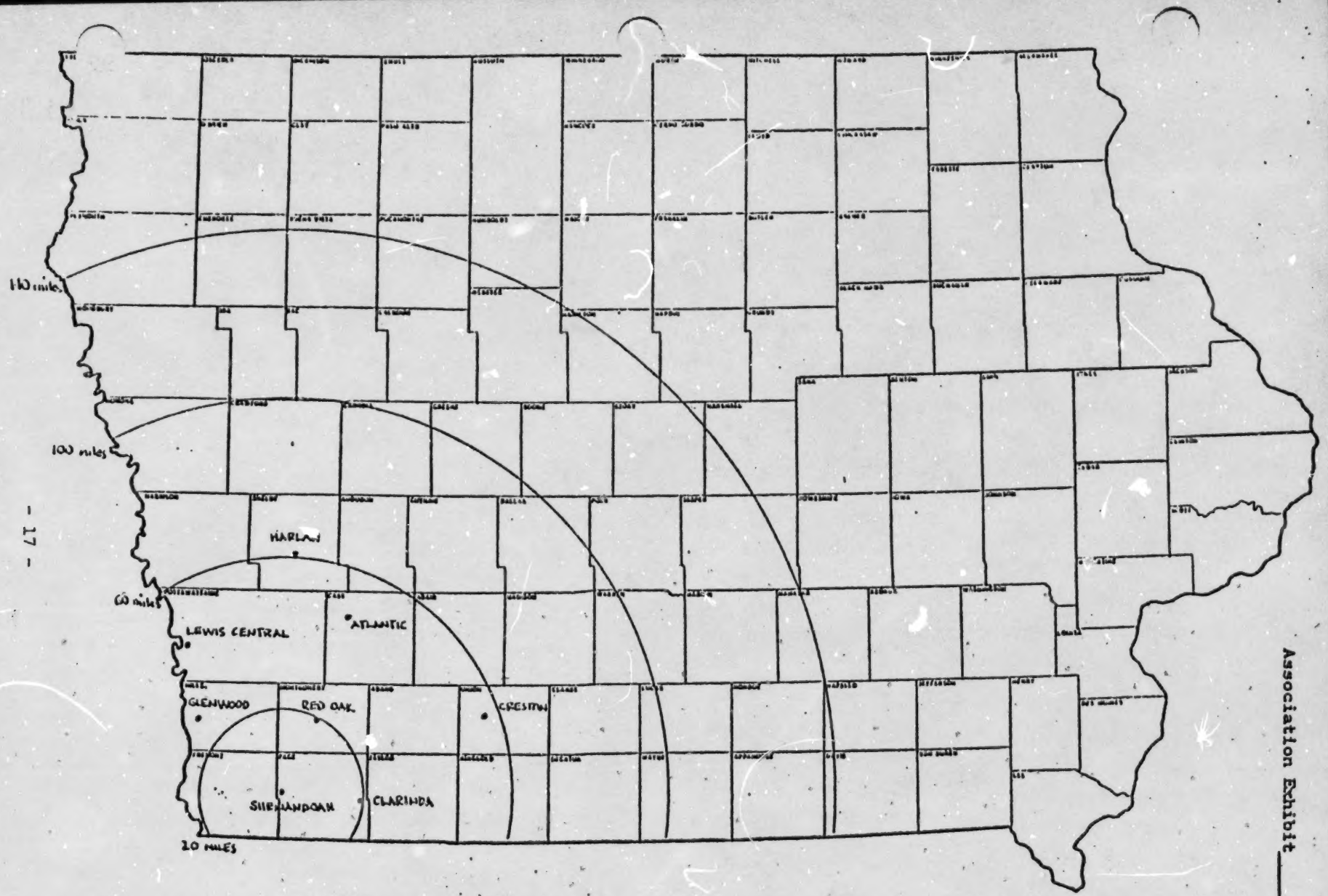
-- History of bargaining between the parties

-- History of community and school district

SOURCES FOR DOCUMENTATION AND RESEARCH

(Salary Only)

1. Cost-of-living indicator
2. Budget analysis
3. Salaries paid to schools of the same size
4. Average salaries - three years
5. Teacher's salaries as percent of total school district budget
6. Teacher's salary as cost per pupil
7. Purchasing power of teacher's salaries figured in terms of COL base figure
8. Comparable contracts
9. School board policies
10. Public interest statement
11. Research Publications of ISEA



Approximate location of Hawkeye 8 schools
Scale: 5/8" equals approximately 20 miles

Association Exhibit_____

COMPARISON OF EASTERN ALLAMAKEE WITH STATE AVERAGES ON
DOLLARS AND PERCENTAGES OF THE GENERAL FUND EXPENDITURES
FOR TEACHER SALARIES

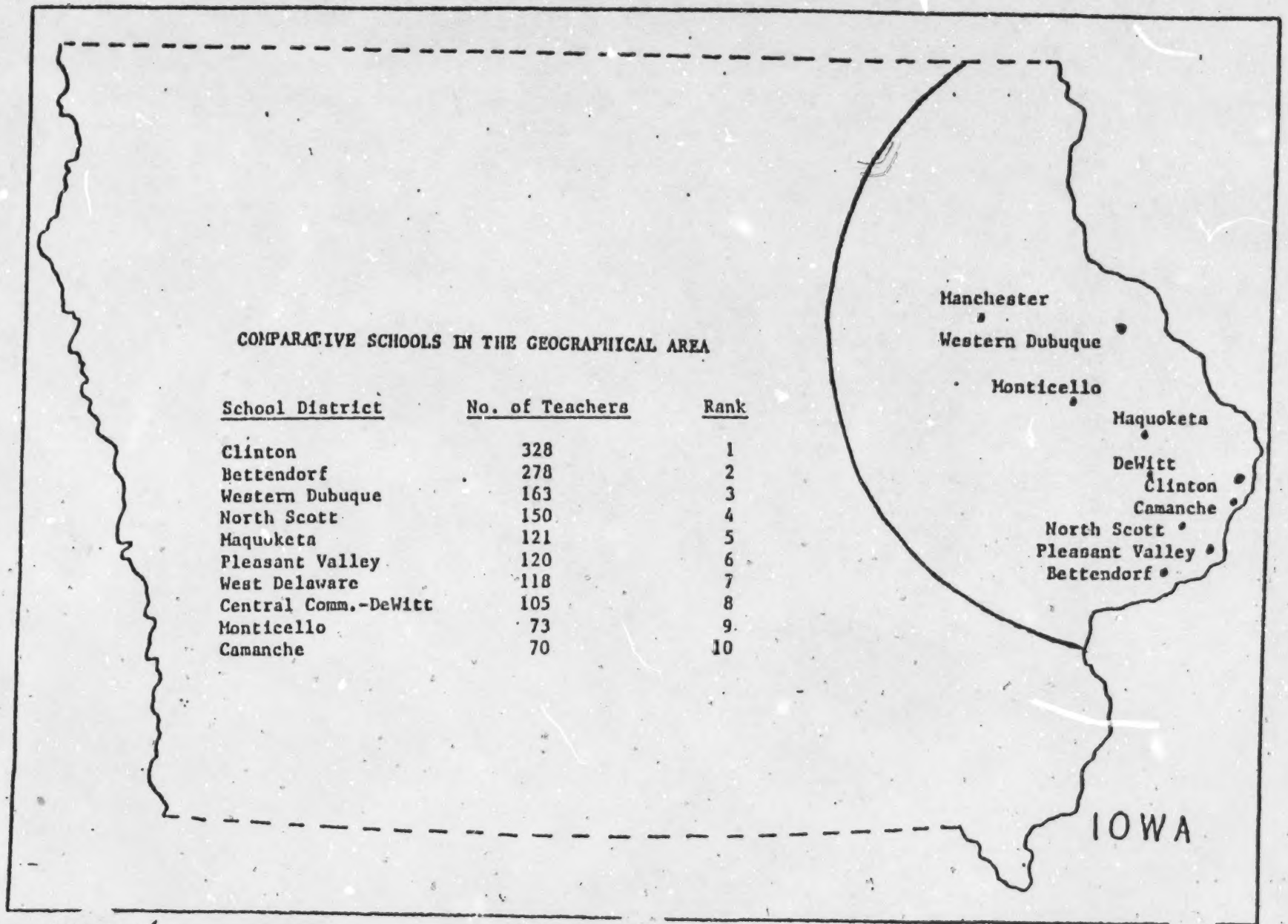
	71-72	72-73	73-74	74-75
State average % spent on teachers for schools in our size range	55.20	55.20	53.08	51.502
% spent on teachers, librarians, guidance, and special teachers in Eastern Allamakee	50.67	48.84	43.64	43.57
Difference in %	- 4.53	- 8.36	- 9.444	- 7.932
Eastern Allamakee District total expenditures in dollars	$643,018.34	$682,620.48	$754,677.66	$836,029.00
Dollars we are below average	-$29,128.73	-$57,067.07	-$71,241.57	-$66,313.82

RATIONALE: Eastern Allamakee has been from $29,000 to $71,000 below the state average in monies expended for teachers salaries.

SOURCE: Cost of Educational Index for 71-72, 72-73, 73-74, and 74-75 General Fund Expenditures by UniServ Unit School Districts

Exhibit _____

MEA EXHIBIT _____



COMPARATIVE SCHOOLS IN THE GEOGRAPHICAL AREA

School District	No. of Teachers	Rank
Clinton	328	1
Bettendorf	278	2
Western Dubuque	163	3
North Scott	150	4
Maquoketa	121	5
Pleasant Valley	120	6
West Delaware	118	7
Central Comm.-DeWitt	105	8
Monticello	73	9
Camanche	70	10

Association Exhibit _____

RANK ORDER OF TOP INDICES OF COMPARABLE IOWA SCHOOLS 77-78

	District	BA Indices
1.	Des Moines	1.63
2.	MUSCATINE	1.61
3.	Iowa City	1.5849
4.	Waterloo	1.5701
5.	Dubuque	1.55
6.	W. Dubuque	1.52
7.	Ames	1.52
8.	Mason City	1.52
9.	Sioux City	1.51
10.	DAVENPORT	1.50
11.	NORTH SCOTT	1.50
AVERAGE		1.497
12.	Ankeny	1.4901
13.	Marshalltown	1.49
14.	Cedar Falls	1.483
15.	Ft. Dodge	1.48
16.	BURLINGTON	1.46
17.	BETTENDORF	1.46
18.	W. Des Moines	1.4439
19.	Newton	1.40
20.	Ottumwa	1.36
21.	Cedar Rapids	1.36
22.	Clinton	NA.
23.	Council Bluffs	NA.

	District	MA Indices
1.	DAVENPORT	1.90
2.	Cedar Falls	1.8747
3.	Des Moines	1.85
4.	MUSCATINE	1.84
5.	Ames	1.84
6.	Ankeny	1.82
7.	Cedar Rapids	1.3155
8.	Iowa City	1.8151
9.	Waterloo	1.8101
10.	NORTH SCOTT	1.80
AVERAGE		1.7885
11.	Marshalltown	1.7801
12.	Mason City	1.7707
13.	Newton	1.77
14.	Sioux City	1.765
15.	Dubuque	1.76
16.	W. Des Moines	1.7549
17.	BURLINGTON	1.739
18.	BETTENDORF	1.739
19.	W. Dubuque	1.73
20.	Ft. Dodge	1.70
21.	Ottumwa	1.685
22.	Clinton	NA.
23.	Council Bluffs	NA.

	District	Top Indices
1.	Marshalltown	2.24
2.	Mason City	2.1232
3.	Ames	2.08
4.	Cedar Rapids	2.0557
5.	DAVENPORT	2.0501
6.	Iowa City	2.0452
7.	Cedar Falls	2.0366
8.	W. Des Moines	2.0227
9.	Newton	2.00
10.	NORTH SCOTT	2.00
AVERAGE		1.9959
11.	Sioux City	1.99
12.	MUSCATINE	1.98
13.	Des Moines	1.98
14.	Ankeny	1.98
15.	Waterloo	1.9501
16.	Ft. Dodge	1.94
17.	BURLINGTON	1.926
18.	BETTENDORF	1.926
19.	Ottumwa	1.92
20.	Dubuque	1.90
21.	W. Dubuque	1.77
22.	Clinton	NA
23.	Council Bluffs	NA

SOURCE: 1977-78 Salary Schedules in Iowa Schools, Research Bulletin 77-03, ISEA

SUMMARY: At BA, MA and top indices, Burlington's schedule is below average. Therefore Burlington must have a high base to provide comparable earnings with other schools.

NSEA EXHIBIT _____

Historical Base Relationship between North Scott and Central-DeWitt

	Central-DeWitt BA Base	North Scott BA Base	Variance
1974-75	8050	8150	+100
1975-76	8700	8800	+100
1976-77	9200	9450	+250
1977-78	9900	9900	-0-
1978-79	10,400	NSEA Proposal, $10,550	+150
		Board Proposal, $10,200	-200

Summary: The Base Salary at North Scott has historically exceeded that of Central-DeWitt by $100, and in one instance the North Scott base exceeded the Central-DeWitt base by $250. The NSEA proposal seeks to retain that relationship. The Board's proposal would seriously alter this relationship by establishing a base $200 below the Central-DeWitt base.

NSEA Exhibit _____

BASE RAISE COMPARISON FOR LARGE SCHOOLS
AND GEOGRAPHIC AREA DURING TWO YEAR PERIOD

School	1976-77		1977-78		1978-79	
	Base	Increase of	Base	Increase of	Base	Increase of
Des Moines	$9300	$500	$9800	$450	$10,300	$500
Davenport	9400	400	9890	490		
Cedar Rapids	9275	225	9750	475		
Waterloo	9139	381	9550	411		
Sioux City	9214	413	9600	386	10,000	400
Dubuque	9450	708	9800	350		
Council Bluffs	9000	550	9425	425		
Iowa City	9200	600	9625	425		
Burlington	9185	585	9620	435	10,100	480
West Des Moines	9500	525	9900	400	10,325	425
Marshalltown	9190	560	9675	485		
Fort Dodge	9000	500	9500	500		
Ottumwa	9075	575	9400	325	9,900	500
Clinton	9430	530	9850	420		
Muscatine	9350	400	9900	550		
Cedar Falls	9075	475	9575	500		
Mason City	9150	350	9500	350		
Bettendorf	9400	350	9900	500	10,275	375
DeWitt	9200	500	9900	700	10,400	500
Pleasant Valley	9766	500	9900	134		
Average Base Increase		481		436		454
North Scott		650		450		
Association Proposed Increase						650
Board Proposed Increase						300

Summary: The North Scott BA base has exceeded the average increase of the comparison group schools in each of the last 2 years. The Board's proposal is $154 below the average base increase reported at this time in the comparison group, while the NSEA proposal is $196 above the average base settlements in the comparison group.

Source: ISEA research

NSEA EXHIBIT _____

Base Raise Comparison for Large Schools and Geographic Area with Increasing Enrollments--Settled to Date

	1976-77		1977-78		1978-79	
	Base	Inc.	Base	Inc.	Base	Inc.
Burlington	9185	585	9620	435	10,100	480
West Des Moines	9500	525	9900	400	10,325	425
Central DeWitt	9200	500	9900	700	10,400	500
Average Base Increase for Increasing Enrollment Schools		537		511		468
Average Base Increase for Schools in Comparison Gro		481		436		454
Average Base	9450	650		450		
			Association Proposal		10,550	650
			Board Proposal		10,200	300

Enrollment Statistics:

	Sept. 76	77-78 Budget Year Enrollment Sept. 77	Jan. 77	Variance
Burlington	7070	7076		+6
West Des Moines	6677	6678		+1
Central DeWitt	2149		2151	+2
North Scott	3450	3583		+133

Summary: BA Base settlements in schools with increasing enrollments are consistently higher than the average of schools. The Association's proposal is more representative of the settlements in schools with increasing enrollments than the Board's proposal. The Association's proposal assures that members of its Bargaining unit will share, on an equitable footing, in the distribution of educational funds as have other professional employees in districts with increasing enrollments.

Source: ISEA research

Association Exhibit _____

TITLE: 10 year earning power for beginning MA teacher in various Hawkeye 8 schools.

SOURCE: 1971-1972 Salary Schedules in Iowa, ISEA Research
1976-1977 Salary Schedules in Iowa, ISEA Research

	1971-72 MA Base	10 yr. earning	rank	1976-77 MA Base	10 yr. earning	rank
Atlantic	7,798	91.300	4	9,968	131.593	3
Clarinda	7,400	86,375	8	9,100	105.175	8
Creston	7,500	87,825	6	9,537	111,356	7
Glenwood	7,500	87,150	7	9,800	116,000	5
Harlan	7,784	93,590	2	9,788	129,417	4
Lewis Central	7,704	89,280	5	10,350	136.620	1
Red Oak	7,840	94,285	1	9,968	131.673	2
Shenandoah	7,800	91,500	3	9,660	111,450	6

Highest 10 yr. earnings	$94,285	Highest 10 yr. earnings	$136,620
Shenandoah 10 yr. earnings	$91,500	Shenandoah 10 yr. earnings	$111,450
difference	$ 2,785(-2.95%)	difference	$ 25,170(-18.4%)

EXHIBIT POINT: The previous exhibit high lighted the slippage of potential earning power of Bachelor teachers. This exhibit uses the same technique for Master's teachers. Assuming a Master's teacher entered at Step 1, the 10 year earnings are reflected above.

The significatnce is the position behind the leader. Shenandoah was only 2.95% below the leader in 1971-1972, but fell to 18.4% behind the leader in 1976-77.

The Association proposal will help bring the potential earning power of teachers in Shenandoah closer to the leaders in 1977-1978.

ADDITIONAL PRESENTATION: The above data is presented in chart form on the following page. It should be noted that Shenandoah was slightly above average ($1,463) potential earning power in 1971-1972. Shenandoah, in 1976-1977, was $10,210 below the Conference average -- again, the loss is about equivalent to one year's salary.

Association Exhibit _____

Cumulative Earnings For BA
1976-77
Schools In 20 Mile Radius of Woodward-Granger

5 Years			10 Years			15 Years		
Rank	School	Earnings	Rank	School	Earnings	Rank	School	Earnings
1.	Ankeny	$51,937	1.	West D.M.	$115,097	1.	Des Moines	$184,428
2.	Des Moines	50,958	2.	Ankeny	113,248	2.	West D.M.	183,687
3.	West D.M.	50,905	3.	Des Moines	112,434	3.	Urbandale	182,887
4.	Urbandale	50,631	4.	Urbandale	111,640	4.	Ankeny	181,402
5.	Johnston	49,750	5.	Johnston	107,000	5.	Johnston	171,749
6.	Perry	48,911	6.	Perry	106,035	6.	Perry	169,401
7.	Ballard	48,060	7.	Ballard	105,020	7.	Ballard	168,744
8.	Waukee	47,704	8.	Waukee	103,952	8.	Woodward-Granger	166,858
9.	Adel-DeSoto	47,150	9.	Woodward-Granger	103,233	9.	Waukee	164,472
10.	Central Dallas	46,980	10.	Central Dallas	102,660	10.	Adel-DeSoto	162,330
11.	Woodward-Granger	46,577	11.	Adel-DeSoto	101,550	11.	Central Dallas	161,820
12.	Dallas Comm.	46,500	12.	Dallas Comm.	100,500	12.	Dallas Comm.	160,739
13.	Madrid	45,900	13.	Madrid	100,300	13.	Madrid	158,100
	North Polk		NA					
	United Community		NA					

Source: ISEA 1976-77 Salary Schedule

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Association Exhibit _____

A COMPARISON OF SALARIES OF CLASS 1 SCHOOLS (0-499)
WHICH HAVE SETTLED FOR 1977-78

School	1976-77 Av. Salary	Av. Salary Increase	1977-78 Av. Salary
Clay Central	$11,623	757	$12,380
Wheatland	11,716	642	12,358
West Bend	11,456	876	12,332
Amana	11,560	570	12,130
Everly	11,482	604	12,078
Bridgewater-Fontanelle	10,752	1,227	11,979
Delwood	11,041	810	11,851
Ogden	10,702	944	11,646
Dumont	10,450	1,121	11,571
Corwith-Wesley	10,890	642	11,532
Lamoni	10,930	551	11,481
Newell-Providence	10,650	795	11,445
Lost Nation	10,774	592	11,366
(Colo Education Proposal)	(10,464)	(826)	(11,298)
Primghar	10,680	612	11,292
Essex	10,533	717	11,250
(Colo Board Proposal)	(10,464)	(582)	(11,046)
Green Mountain	10,451	580	11,031
Baxter	10,655	344	10,999
Crestland	10,309	630	10,939
Semco	10,173	766	10,939
Lone Tree	10,226	411	10,637
AVERAGE	$10,834	$710	$11,562

CONCLUSION:

1. The average of the 1976-77 average salary for these schools is $10,834. Colo was $370 below this figure.

2. The average of the 1977-78 average salaries for these schools is $11,562. The Colo Education Association proposal is $318 less than this, and the Colo Board proposal is $577 less than the average figure.

3. In 1976-77 Colo ranked 16 out of these 21 schools in average salary.

4. If adopted, the Colo Education Association proposal would rank Colo 14th out of these 21 schools in average salary.

5. If adopted, the Colo Board proposal would rank Colo 17th out of these 21 schools in average salary.

SOURCE: ISEA Research 1976-77, Average Salary Analysis of Iowa Schools. No. 77-78 Settlements Research.

Carlisle Community Education Association

Exhibit # June 3, 1977

Subject: 1976-77 Average Teacher Salaries of Statewide Comparison Group

School District	Average Teacher Salary	
Audubon	$13,498	
Pella	13,363	
Monticello	13,267	
Sheldon	13,065	
Camanche	13,058	HIGH 13,498
Mid-Prairie	12,613	LOW 11,745
Carroll	12,454	AVERAGE 12,692
Hampton	12,272	
Benton	12,255	
Carlisle	12,030	
Forest City	11,745	

CCEA Position: This exhibit shows that the Average Teacher Salary for 1976-77 in Carlisle is below that of schools in the statewide comparison Group.

Source: 1976 Salary Analysis
ISEA Reasearch Bulletin #76-01

WEA Exhibit: _____

Historical Relationship of BA Bases among Schools in Comparison Group that have Completed Contract Negotiations for 1977-78

	1974-75	Rank	1975-76	Rank	1976-77	Rank	1977-78	Rank	
Bennett	$7800	11	$8350	14	$8850	15	$9100	16	
Camanche	8350	1	8775	4	9583	2	9900	1	
Central DeWitt	8050	5	8700	6	9200	8	9900	1	
Columbus	7500	15	8350	14	8800	16	9200	14	
Davenport	8300	2	9000	2	9400	4	9850	6	
Delwood	7900	9	8500	11	9100	10	9300	13	
Durant	7900	9	8700	6	9100	10	9575	11	
East Central	8000	6	8725	5	9300	6	9700	8	
Louisa-Muscatine	7500	15	8300	16	9000	12	9800	7	
Muscatine	8000	6	8700	6	9350	5	9900	1	
Northeast	8000	6	8650	9	9250	7	9700	8	
North Scott	8150	4	8800	3	9450	3	9900	1	
Pleasant Valley	8240	3	9266	1	9766	1	9900	1	
West Liberty	7722	14	8500	11	8950	13	9325	12	
Wheatland	7800	11	8400	13	8900	14	9200	12	
Wilton	7800	11	8600	10	9150	9	9600	10	Board
							9650	10	Assoc. and Fact-finder

Summary: Although the Board's proposal and the Association's proposal would drop the Association's relative rank one place in the comparison group, the Association's proposal comes closer to maintaining our rank of nine than does the Board's proposal.

Source: ISEA Research Bulletin No. 76-10

HEARTLAND EDUCATION ASSOCIATION
EXHIBIT _____ DATE _____

NUMBER OF A.E.A'S UTILIZING INDEXED SALARY SCHEDULES
VS NON-INDEXED SCHEDULES

A.E.A.'S	INDEX	NON-INDEX
A.E.A. #1	X	
A.E.A. #2		X
A.E.A. #3	X	
A.E.A. #4	X	
A.E.A. #5	X	
A.E.A. #6	X	
A.E.A. #7	X	
A.E.A. #8	X	
A.E.A. #9	X	
A.E.A. #10	X	
A.E.A. #11	X	
A.E.A. #12	X	
A.E.A. #13	X	
A.E.A. #14	X	
A.E.A. #15	N/A*	
A.E.A. #16		X

12 out of 14 reporting AEA's within our comparability group have indexed salary schedules.

Both AEA's reporting which do not have an index also lack an employee's association.

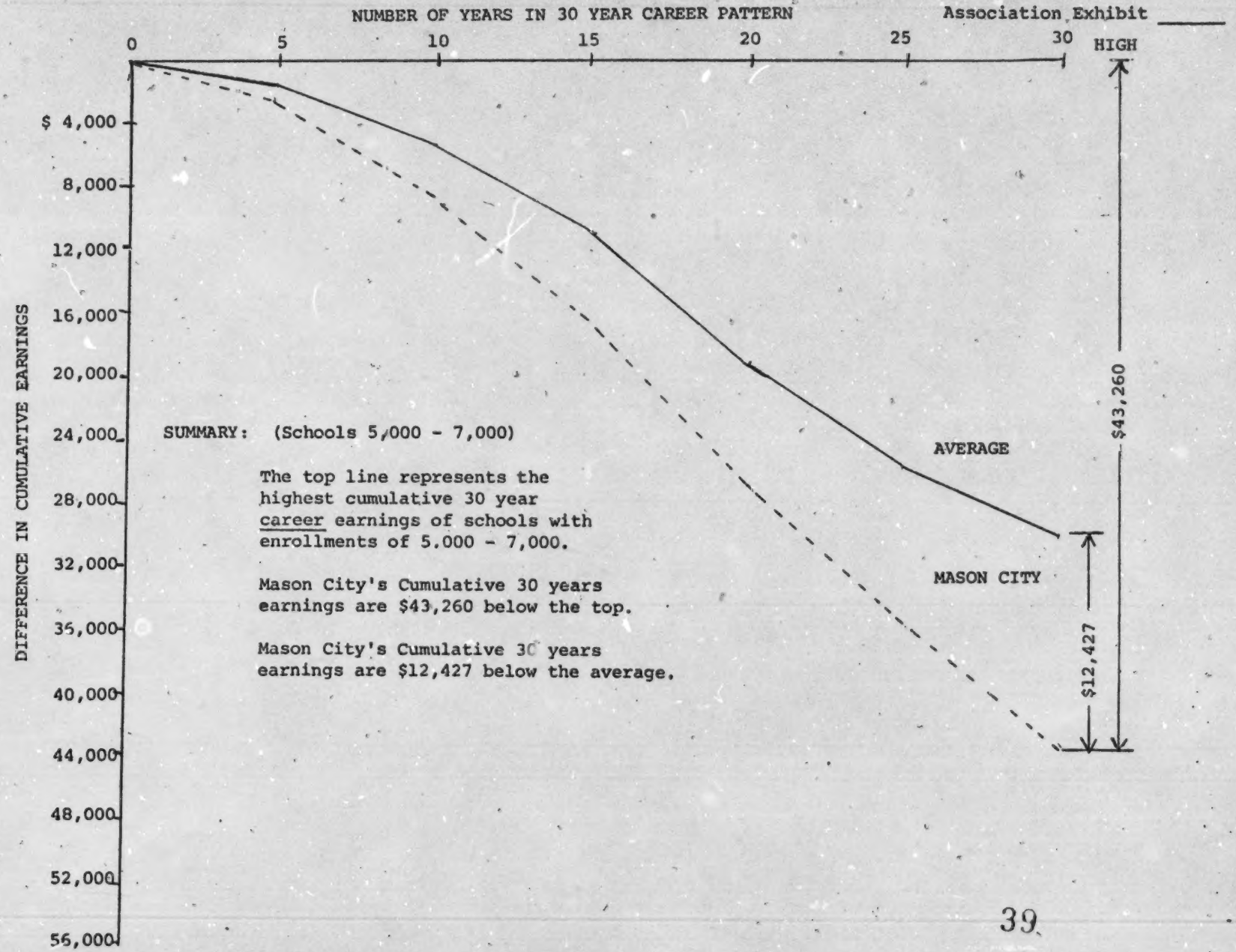
AEA's 1, 7, 9, 11, 12, and 13 serve metropolitan areas of Iowa.
All of these AEA's utilize an index when calculating salary schedules.

This position is supportive of the Association's position that an indexed salary schedule should remain in effect.

*Contracts were not available for comparison.

Source: AEA Comparability Group Master Contracts

Association Exhibit _____



SUMMARY: (Schools 5,000 - 7,000)

The top line represents the highest cumulative 30 year career earnings of schools with enrollments of 5.000 - 7,000.

Mason City's Cumulative 30 years earnings are $43,260 below the top.

Mason City's Cumulative 30 years earnings are $12,427 below the average.

- 30 -

CREA _____

INSURANCE BENEFITS IN TWELVE LARGEST DISTRICTS
IN 125 MILE RADIUS 1977-78

	Employee	Dependent	Life	Other
Des Moines	100%	$8 per mo.	$7,500	Disability
Davenport	100%	100%	$2,000	Disability
Waterloo	100%	$5 per mo.	$6,000	Dental, Drug
Dubuque	100%	75%	$8,500	
Iowa City	100%	$45. maximum	$10,000-15,000	Disability
Burlington	100%	100%	$10,000	----
Ottumwa	100%	0	N. A.	$20. (TSA in lieu of Health & Major Medical)
Clinton	100%	50%	$10,000	----
Marshalltown	100%	$5 per mo.	---	----
Des Moines	100%	53%	$7,000	Disability
Muscatine	100%[1]	0	$5,000	Disability
CREA Proposal	100%	25%	$15,000	Disability
District Proposal	$30.00	?	$15,000	Disability

1 Tax Shelter option in lieu of employee Health & Major Medical

ABILITY TO PAY

The local association has the burden to demonstrate to a fact-finder that the employer has the ability to pay if, in fact, the employer claims it can't afford the Association's demands. In the absence of such a claim by the employer, comparability becomes more important.

However, whether the employer claims inability to pay or simply cries about financial problems, the local association ought to be prepared to advance data that will demonstrate financial capabilities. The decision regarding specific exhibits and types of data will be determined by what the local research uncovers. However, certain kinds of data may prove helpful:

A. 3-5 years analysis of district's budget (which should be updated from year to year)

B. Unspent balance history (3-5 years of projected versus actual)

C. Turnover history (projected versus actual)

D. Projected Revenues based on General Fund Worksheet

E. Cost of Association's and Employer's Proposal

F. Evidence of inaccuracy of previous employer projections of expenditures and revenues

G. Evidence of Board actions such as cutting programmed staff that results in savings.

H. Analysis of Spending Patterns to reveal the sources of unspent balance, padding, or unusual trends

In addition, each local must obtain and keep the information listed below:

At the time of settlement . . . . .

1. Scattergram of 1977-78 teacher placement on salary schedule
2. Scattergram of estimated 1978-79 teacher placement on schedule
3. Total Estimated Budget available for 1978-79 according to Employer and the local education association (if different)
4. Actual number of pupils
5. Estimated 1978-79 enrollment
6. Estimated Unspent balance to be carried into 1979-80
7. Estimated Miscellaneous Income
8. Estimated Costs of Settlement (if different, include both the Employer's and local E.A.'s estimates)

9. Any lists or handouts obtained during bargaining which relate to anticipated expenditures or costs.

Much of this information is available from the General Fund Budget, Aid & Levy Worksheet for School Year _____. This information could be helpful each year since many districts overestimate costs of teacher salaries and underestimate revenues; thus, accounting in part for the decline in the percent of budget going to bargaining unit members. Locals having this subsequent information now would have a head start on bargaining next September, and each year this information should be gathered.

It is also important for the local to obtain copies of budgets and other information from the employer in order to bargain intelligently. Some of the information above as well as other necessary documents are listed in a sample letter in Appendix D.

COSTING YOUR PROPOSAL

1. Complete the cost of the salary and fringe benefit program at the time it was bargained (i.e. Dec., Jan., etc.) Compute the effects of any reopener. Keep accurate records of estimated costs from previous year's bargaining (both yours and Boards.)

2. How to compute one index factor for your index schedule to simplicity costing:

   A. Obtain a scattergram of the placement of all bargaining unit employees on the current salary schedule.

   B. Take the number of employees on each step times the index number for that step (i.e. 1.04 x 5 = 5.20)

   C. Add the answers from each step to obtain a total index factor which when multiplied by the current base will give you the current cost to the district of bargaining unit employees' salaries.

   D. Move each current employee to the next higher step on the salary schedule.

   E. Take the number of employees on each step times the index number for that step (i.e., 1.08 x 5 - 5.20)

   F. Add the answers from each step to obtain a total index factor which can be multiplied times <u>any</u> new base for your school district to give you the cost of bargaining unit employees on the new salary schedule.

   G. By subtracting the total costs of "C" from the total costs of "F", one can obtain the increased cost of base or index changes.

   H. Supplemental Pay schedules indexed to the base can be done in much the same manner.

   I. This method of costing does not account for turnover of staff persons or of horizontal lane changes.

3. To cost insurances, each local will need the following:

   A. The number of current employees covered by existing plans and the district's cost for each employee group, (annually or monthly.)

   B. From an insurance company representative, each local should obtain the increased costs of coverages and the estimates of costs for proposed benefits.

DEA EXHIBIT _____

PROJECTED 1978-79 SCATTERGRAM

(REGULAR TEACHERS EXCLUDING TITLE I AND SPECIAL EDUC.)

STEPS	B.A.	B.A.+15	M.A.	M.A.+15	M.A.+30	SPEC. & DRS.
1	--	--	--	--	--	--
2	13.125	--	.6	--	--	--
3	36.300	1.150	--	--	--	--
4	39.675	6.000	6.5	--	--	--
5	30.600	5.625	6.75	.7	--	--
6	54.375	19.500	9.10	--	--	--
7	46.150	29.700	18.85	3.0	1.55	--
8	42.525	36.400	15.00	6.20	--	--
9	32.900	31.175	24.80	1.60	3.30	--
10	21.750	36.000	24.80	6.60	1.70	--
11	126.750	309.225	24.75	17.00	7.00	3.60
12	--	--	24.65	8.75	3.60	--
13	--	--	45.50	5.40	5.55	1.90
14	--	--	42.30	9.25	1.90	--
15	--	--	27.75	5.70	5.85	--
16	--	--	148.20	143.325	164.00	20.50
TOTAL	444.15	474.775	419.55	207.525	194.45	26.00

TOTAL INDEX FACTOR = 1766.45

SOURCE: D.C.S.D. PERSONNEL OFFICE
1977-78 MASTER CONTRACT

WEA Exhibit _____

COMPUTATION OF 1977-78 TOTAL COSTS FOR ASSOCIATION PROPOSALS AS A PERCENTAGE OF THE CONTROLLED BUDGET REGULAR PROGRAM

1.	BA Base (Present Schedule)	$ 716,636.00
2.	Additional step to BA and MA columns	7,334.00
3.	Extended contracts	5,134.00
4.	Additional hours	2,316.00
5.	Nurse's Salary	5,652.00
6.	Insurance	
	a. employee	28,083.00
	b. dependent	5,294.52
	c. tax-sheltered option	8,182.44
7.	Extra duty	31,111.10
	TOTAL COST	$ 806,637.06

CONTROLLED BUDGET REGULAR PROGRAM	$ 1,269.372
Total Cost ÷ Controlled Budget	63.5%

IEA EXHIBIT T

Budget Overestimate Patterns in Instruction Costs

Year	Estimate	Actual	Difference Between Estimate & Actual
1970-71	$1,295,328	$1,256,053	$32,274
1971-72	1,374,583	1,315,152	59,431
1972-73	1,410,596	1,329,791	80,804
1973-74	1,456,292	1,405,948	59,344
1974-75	1,638,619	1,546,004	92,615
		Average Difference	$65,694

Instruction is only one of all ten line items which have been consistently overestimated in the budget.

The IEA believes that a budget based on real forseeable need along with a designated contingency fund, would be better bookkeeping and would not appear to be an attempt to mislead.

Source: Information from attached sheets was secured from the ISEA Research Department's comparisons which were computed from the Department of Public Instruction's Basic Education Survey File (BEDS)

IEA EXHIBIT M

A Study of the Percentage of total general fund expenditures for Teachers' Salaries

Percentage of General Fund Expenditures for Teachers' Salaries

(a)	the 1970-71 school budget	56.3%
(b)	the 1971-72 school budget	51.9%
(c)	the 1972-73 school budget	53.5%*
(d)	the 1973-74 school budget	51.2%
(e)	the 1974-75 school budget	50.0%
(f)	the 1975-76 (est.) school budget	45.6%
	Net Loss	10.7%

Conclusion: This exhibit supports the conclusion of exhibit ____, that budget priorities are the root of declining salary status for the professional staff of this school district. In four years, teachers' salaries declined by 5.1% of the general fund expenditures. In the fifth year, the decline was 6.3%. But, if the estimated budget for the 1975-76 year is accurate, the decline will accelerate to 10.7%!

(*Attached sheet notes state average for 1972-73 to be 63.32.)

Source: The school budgets of the Independence Community Schools for the six year period from 1970-71 through the estimated budget for the present school year of 1975-76.

IEA EXHIBIT L

A Study of the Percentage of Total School Budget of the Indpendence Community Schools Spent for Instruction

Percentages Allowed for Instructional Costs

(a)	the 1970-71 school budget	68.0%
(b)	the 1971-72 school budget	63.0%
(c)	the 1972-73 school budget	65.3%*
(d)	the 1973-74 school budget	64.8%
(e)	the 1974-75 school budget	62.0%
(f)	the 1975-76 (est.) school budget	55.2%
	Net Decline	12.8%

Conclusion: The conclusion of the IEA negotiations team is that the decline in the percentage allocated for instructional costs (12.8%) is (a) one of the basic factors in the present low standing of professional salaries in our district. (Note exhibit _____). (b) this reordering of budget priorities has resulted in a large budget surplus, of which a small portion must be used to correct the inequities that have resulted because of this accumulation. This would leave the district with a substantial budget carryover and cash balance for any projected repairs or improvements the board sees fit to make.

(*Attached sheet notes expenditure by percentage of total budget for all categories)

Source: The school budgets of the Independence Community Schools for the six year period from 1970-71 through the estimated budget for the present school year of 1975-76.

ASSOCIATION EXHIBIT _____

Scattergram of Association's Proposed Schedule

W O O D W A R D - G R A N G E R C O M M U N I T Y S C H O O L

1977 - 1978

8,900 4 x 4 compounded

	B.A.	B.A. + 15	B.A. + 30	B.A. + 45	M.A.
1	$8,900				
2	2@ 656				
3	7@ 682				
4	4@ 710	1@ 739			1@ 833
5	3@ 739				
6	2@ 769		½@ 417		
7	2½@ 800	1@ 833			1@ 938
8	1@ 833		1@ 901		2@ 976
9	1@ 866				
10		1@ 938			1@ 1056
11		2@ 976			
12	4@ 976				
13		2@ 1056			
14				1@ 1190	5@ 1237
Totals	20,284	6,574	1,318	1,190	10,964

Total Increase $40,330

NSEA Exhibit_____

FOUR YEAR SALARY INCREASE COMPARISON OF A TEACHER MOVING ON THE SALARY SCHEDULE AND A TEACHER WITH THE MAXIMUM YEARS ALLOWED ON THE SCHEDULE BA COLUMN.

	TEACHER A		TEACHER B	
YEAR AND BASE	INDEX AND SALARY	INCREASE	INDEX AND SALARY	INCREASE
1974-75 $8,150	1.30 $10,595		1.50 $12,225	
1975-76 $8,800	1.35 $11,880	$1,285	1.50 $13,200	$975
1976-77 $9,450	1.40 $13,230	$1,350	1.50 $14,175	$975
1977-78 $9,900	1.45 $14,355	$1,125	1.50 $14,850	$675
DOLLARS SALARY INCREASE		$3,760		$2,625
PERCENT OF SALARY INCREASE		35.49%		21.47%

This clearly shows the need for longevity steps to be added to the salary schedule. The average CPI for the same period of time has increased 33.12%. As this study indicates the teacher not moving on the salary schedule has lost considerably in buying power.

NSEA Exhibit _____

Percent of Bargaining Unit locked in at bottom of Schedule

1975-76 Contract Year

BA		BA+15		BA+30		MA		MA+15		MA+30		
Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	TOTAL
1.45	3	1.55	2	1.65	1	1.75	1	1.85	0	1.95	1	8
1.50	20	1.60	6	1.70	10	1.80	9	1.90	5	2.00	1	51

TOTAL POSITIONS 167
AT BOTTOM OF SCHEDULE 30%

1976-77 Contract Year

BA		BA+15		BA+30		MA		MA+15		MA+30		
Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	TOTAL
1.45	6	1.55	0	1.65	1	1.75	1	1.85	0	1.95	0	8
1.50	22	1.60	9	1.70	7	1.80	11	1.90	4	2.00	2	55

TOTAL POSITIONS 184
AT BOTTOM OF SCHEDULE 30%

1977-78 Contract Year

BA		BA+15		BA+30		MA		MA+15		MA+30		
Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	Index	Teachers	TOTAL
1.45	2	1.55	1	1.65	0	1.75	5	1.85	0	1.95	0	8
1.50	24	1.60	9	1.70	9	1.80	11	1.90	4	2.00	2	59

TOTAL POSITIONS 194.5
AT BOTTOM OF SCHEDULE 30%

Summary:

This data clearly demonstrates that a significant percent of the bargaining unit is at the bottom of the salary schedule and that this number is increasing annually. The association is proposing a longevity clause to provide the teaching staff adequate compensation for their years of service to the North Scott Community School District.

DEA EXHIBIT _____
Page 1

SUMMARY OF SELECTED TEACHERS' EARNINGS
OVER THE PERIOD FROM 1975-1978

CATEGORY OF EMPLOYEE	DOLLAR INCREASES (1975-1978)	PERCENT INCREASE (1975-1978)
B.A. Teacher:		
Teacher at top - Step 11	$13,095 - $14,775 = $1680	12.8
Teacher moved Step 5 - 7	$10,530 - $12,805 = $2275	21.7
M.A. Teacher:		
Teacher at top	$17,100 - $18,715 = $1615	9.4
Teacher moved Step 5 - 7	$12,150 - $14,283 = $2133	17.5
M.A. + 30 Teacher:		
Teacher at top	$18,000 - $19,700 = $1700	9.4
Teacher moved Step 5 - 7	$13,050 - $15,268 = $2218	17.0

(Continued)

SUMMARY:

* This exhibit shows a comparison of Davenport's teachers' salary for those employees who have been locked at the top of salary lanes for three years, as opposed to those moving through the schedule receiving increments for three years, 1975-1976 through 1977-1978.

CONCLUSIONS:

* The average increase in % for those at the top of the B.A. lane was 8.9% less than those moving through the incremental schedule for the same period in that salary lane.

* Teachers at the top of the B.A. lane have averaged only a 4.26% average annual increase during this three-year period.

* The average increase in % for those at the top of the M.A. lane was 8.1% less than those moving through the incremental schedule for the same period in that salary lane.

* Teachers at the top of the M.A. lane have averaged only a 3.13% average annual increase during this three-year period.

* The average increase in % for those at the top of the M.A. + 30 lane was 7.6% less than those moving through the incremental schedule for the same period in that salary lane.

* Teachers at the top of the M.A. + 30 lane have averaged only a 3.13% average annual increase during this three-year period.

* A total of 495.5 employees, or 38.4% of the employees in our bargaining unit, have received raises over the past three years far below the cost of living.

PURPOSE:

This data clearly demonstrates that employees who have remained at the top of their salary lanes for the last three years have received significantly smaller percentage salary increases than employees moving through the schedule.

SOURCE:

1977-78 master contract

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WEA Exhibit _____

State Average Total Dollar Unspent Balance for All School Districts with January Headcount Enrollment Between 500-999 - as Compared to Wilton Community School District

	State Average Unspent Balance	Wilton Unspent Balance	Wilton % of State Average
1973-74	$ 19,092	$ 19,690	103%
1974-75	45,028	78,637	175%
1975-76	51,892	105,075	203%
1976-77	57,086 (Aug. Est.)	118,850	208%

Wilton Unspent Balance as compared with Budget Estimate for each year 1973 - 1976. Actual figures obtained from certified budgets prepared by the office of the State Comptroller. The 1976-77 figure was confirmed by the office of the School Budget Review Committee, Sam Wiley, Chairperson Department of Public Instruction.

	Estimate	Actual	
1973-74	$ 19,000	$ 19,690	
1974-75	42,910	78,637	(shows zero in book 76-77)
1975-76	19,924	105,075	
1976-77	50,000	100,804	
1977-78	0	—	

SUMMARY: Traditionally since 1973-74 Wilton's unspent balance has been above the state average unspent balance for schools with similar enrollment. In the past two years Wilton's unspent balance has been more than double the state average.

SOURCE: ISEA Research
Research Bulletin No. 76-12
Iowa School District Unspent Balance Trends
School Budget Review, Department of Public Instruction

CREA _____

UNSPENT BALANCES IN CEDAR RAPIDS SCHOOL DISTRICT BUDGETS

Budget Year	Estimates Before & During Negotiations	Estimates After Negotiations[1]	Actual[2]
1972-1973			$ 506,915
1973-1974	"Unexpected development" was supposed to be a "close budget closure" as estimated in spring of '74 during negotiations.[3]		1,117,741
1974-1975	-386,419 (Spring '74)[4]	400,000 (5/23/75)	1,812,788
1975-1976	-1,200,000(10/23/74)[5] - 272,000(1/17/75)[6] 0 - 500,000 (12/17/75)[7]	800,000 (2/17/76)	1,588,718
1976-1977	0 - 100,000		1,506,416[8]

A negative sign preceding a number means a deficit of the amount shown was predicted for that budget year.

1 District Budget Estimations developed by District
2 Supplemental Detail General Fund Worksheet developed by District
3 Excerpt from "The $8,900 base package" an analysis by Will Jacobs
4 IBID - spring 1975
5 October 23, 1974 news article in "The Cedar Rapids Gazette"
6 Board Communication to the Staff - January 17, 1975
7 District Budget estimate - 12/17/75
8 Estimate - Based on average over last three years

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IEA EXHIBIT Q

Schools Which Lead the State in Unspent Balances

In 1974-75 Independence had an unspent balance that ranked it 18th out of 452 schools. All schools with $250,000 or more unspent balance are listed below.

1.	Des Moines	$2,730,971
2.	Waterloo	1,257,848
3.	Cedar Rapids	1,117,741
4.	Council Bluffs	734,607
5.	Davenport	420,815
6.	Clinton	332,876
7.	Ames	323,373
8.	Oskaloosa	292,789
9.	Washington	291,408
10.	Marion	287,937
11.	Burlington	281,318
12.	North Scott	273,023
13.	Hampton	272,626
14.	South East Polk	272,607
15.	Western Dubuque	267,499
16.	Fort Dodge	267,418
17.	Fort Madison	261,624
18.	Independence	256,118

Source: ISEA Research Unit

ASSOCIATION EXHIBIT _____

HISTORY OF TEACHER TURNOVER

Employees leaving	Placement	Salary	Employes hired	Placement	Salary	Difference	
Dorothy Ehm	11BA + 15	10,771	Nancy Peterson	1 BA	7,000	3,771	
Charles Kimpston	10 BA	9,959	Steve Carter	5 BA	8,187	1,772	
Sandra Martin	5 BA	8,514	Mary Riley	1 BA	7,000	1,514	1973-1974
Marie Knoll	11BA + 15	10,771	Bruce Gast	1 BA	7,000	3,771	savings
Harriett Mitts	9 BA	4,788	Connie Tow	4 BA	3,937	851	$16,323
Kathy Wade	1P BA	7,873	Debie Wedell	1 BA	7,000	873	
Josephine Crum	11BA + 15	10,771	Mary Hopp	1 BA	7,000	3,771	
Bud Bright	8 MA	11,469	Nancy Hickman	4 BA	8,380	3,089	
Lou Doty	12 MA	13,417	Steve Bracewell	1 BA	7,450	5,967	
Kenneth Harlan	10 MA	12,405	Dawn Hutchison	2 MA	9,064	3,341	
Ray Kendall	13BA + 45	13,417	Steve Arenda	6 MA	10,604	2,813	
Nancy Peterson	2 BA	7,748	Jan McCord	2 BA	7,748	0	
Mary Riley	2 BA	7,748	Mary Whitehill	3 BA	8,058	-310	1974-1975
Tom Wehr	6 BA	9,064	Tim Baldwin	1 BA	7,450	1,614	savings
Jane Nelson	8 MA	11,469	Kathy Christianson	1 BA	7,450	4,019	$22,042
Liz Bowman	5BA = 15	9,064	Linda Carlson	3 BA	8,058	1,006	
Leon Allen	5 BA	8,715	Bernard Ofstehage	7 BA	9,427	-712	
Richard Teig	7 BA	9,427	Mary Lou Porter	3 MA	9,427	0	
Connie Tow	5 BA	4,358	Marilyn Bell	4 BA	4,190	168	
Linda Wibben	7 BA	9,427	Linda Sanders	4 BA	8,380	1,047	
Nancy Hickman	5 BA	9,427	Brian Schlofelt	2 BA	8,380	1,047	
Mary Whitehill	4 BA	9,064	Rhonda Hisel	1 BA	8,058	1,006	1975-1076
Mary Lou Porter	4 MA	10,604	Duane Long	6BA + 30	10,604	0	savings
Linda Sanders	5 BA	9,427	Marcia Hora	1 BA	8,058	1,369	$4,903
Karen Ryan	7 BA	10,196	Larry Read	2BA + 15	8,741	1,481	
Jan Hale	3 BA	9,301	Christine Vogel	2 BA	8,944	357	
Mike Mead	8 MA	13,274	Elwin Emery	13 MA	16,099	-2,865	1976-1977
Elnora Gehring	12BA + 15	13,763	Beth Finestead	1 BA	8,600	5,163	savings
Elzada Snider	12BA + 15	13,763	Kathy Wade	2 BA	8,944	4,819	$19,132
Barb Saltsgaver	8 BA	11,314	----------			11,314	
Marcia Hora	2 BA	8,058	Nancy Erickson	1 BA	8,600	344	

Source: Woodward-Granger School Listing Salary Schedule

Association Exhibit_____

RETIREES, RESIGNATIONS OR TERMINATIONS AFTER FEB. 1
AND PRIOR TO MAY 15

Name	Lane	Burlington Experience Step	Index	$9676 Salary	$10,340 Salary
Anna Mae Montgomery	MA + 30	15	1.879	18,181.20	19,428.86
Esther Duncan	BA	11	1.46	14,126.96	15,096.40
Ruth Walker	BA + 15	11	1.507	14,581.73	15,582.38
Velma Collopy	MA + 15	14	1.786	17,281.34	18,467.24
Elinor Lundgren	MA + 15	14	1.786	17,281.34	18,467.24
Sally Allen	BA	5	1.184	11,456.38	12,242.56
Marian Conway	BA + 15	4	1.185	11,456.06	12,252.90
Terri Tolleen	BA	3	1.092	10,566.19	11,291.28
Robert (Mac) Osborn	BA	2	1.046	10,121.10	10,815.64
Carol Li (leave absence)	MA + 15	3	1.28	12,385.28	13,235.20
Don White	BA + 15	4	1.135	11,486.06	12,252.90
Julie Swanson	BA	1	1.000	9,676.00	10,340.32
Anne Bagby	BA	4	1.138	11,004.00	12,243.00
Dorothy Haugen	BA + 15	11	1.507	14,581.73	15,582.33
Art Sundermeier	MA + 15	9	1.555	15,055.85	16,089.04
				199,231.22	213,387.02

SOURCE: Administration records - Marge Raiston, Secretary to Superintendent

SUMMARY: If all 15 staff members were replaced, and all were replaced at the BA beginning step the cost to the District would be $155,100 or a savings of $44,131.

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ASSOCIATION EXHIBIT_____

PERCENT OF BUDGET NEW LONDON SPENT ON CAPITAL OUTLAY SINCE 1974-75

	N.L. % Capital Outlay	Ave. % for Schools 500-999
1974-75	5.151%	3.559%
1975-76	6.408%	2.879%
1976-77	11.112%	2.483%
1977-78	7.57%*	Unknown

*Divide $95,000 from Secretaries Monthly Reports by $1,245,000 off same report.

SUMMARY: New London has repeatedly spent a larger per cent of the budget on capital outlay than the average for similarly sized schools.

SOURCE: Cost of Education INdex, November 1975, March 1977, December 1977.

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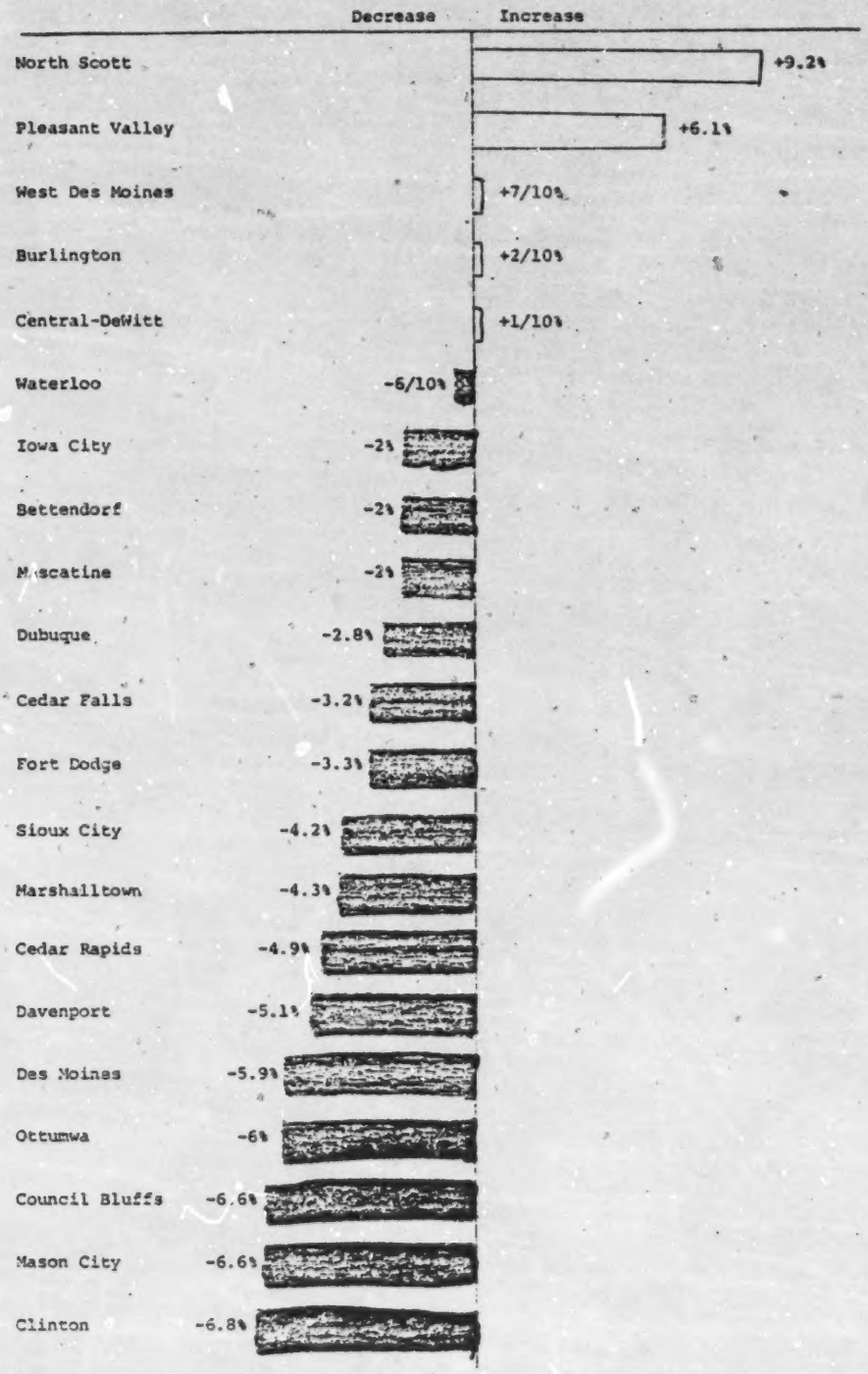
NSEA EXHIBIT _____

Percentage of Increase or Decrease in Enrollment of Comparison Group Schools from Calendar Year 1975 to Calendar Year 1977



Summary: North Scott is one of few districts in the state with increasing enrollment. This fact is reflected in the Association's comparison group.

DEA EXHIBIT _____

G.F. SCHOOL BUDGET, AID & LEVY
WORKSHEET FOR SCHOOL YEAR 1978-79

A.E.A., County & District No. _____ School District Name Davenport E.A.

COMPUTATIONS TO DETERMINE BUDGET DOLLARS AVAILABLE

1977-78		1978-79		
1.0		1.0		DISTRICT ENROLLMENT CALCULATION:
.1	23 205	.1	22,624	Base Year Enrol. (Headcount for Jan. or Sept. 1977, whichever used)
.2	22.624 -	.2	21,452	- Subtract Budget Year Enrol. (Jan. 1978) (If greater than 1.1 go to 1.8)
.3	581 =	.3	1,172	= Number Decrease
.4		.4	1,191	5% of Number in Line 1.1
.5	290 X	.5	336	X Multipy 50% Times the Lesser of Line 1.3 or 1.4
.6	X	.6		X If Line 1.3 Greater than 1.4 Multipy Difference by 25%
.7	290 =	.7	336	= Bonus Enrol. (Total of lines 1.5 & 1.6)
.8	22,114	.8	22,288	Total Adjusted Enrol. (Total of lines 1.2 & 1.7)
.9	1925 +	.9	1295	+ Weighted Enrol. (Only such amount in addition to headcount of one)
.10	24,777 =	.10	23,583	= Total Weighted Enrollment (Lines 1.8 & 1.9)
		2.0		REGULAR PROGRAM AND SPEC. EDUC. DISTRICT COST CALCULATION:
.1*	1247	.1*	1348	1977-78 Regular Program Cost Per Pupil (Excluding all A.E.A. costs)
.2	? +	.2	5	+ 1977-78 S.B.R.C. Allowable Growth Granted after June, 1977 Converted to Cost Per Pupil
.3	99 +	.3	127	+ Add Regular Program Growth Per Pupil
.4	1346 =	.4	1480	= Total Regular Program Cost Per Pupil
.5	22,114 X	.5	22,288	X Total Adjusted Enrollment (Line 1.8)
.6	30,885,072 =	.6	32,986,240	= Total Regular Program District Cost = New Money = 2,098,168
.7	1348	.7	1480	Total Regular Program Cost Per Pupil (Line 2.4)
.8	1295 X	.8	1295	X Weighted Enrollment (Line 1.9)
.9	2,540,120 =	.9	1,916,600	= Total Spec. Educ. District Cost for Instruction in Addition to One
.10**		.10**		1977-78 A.E.A. Spec. Educ. Support Cost Per Pupil
.11	+	.11		+ Add A.E.A. Spec. Educ. Growth Per Pupil
.12	+	.12		+ Add Newly Identified A.E.A. Spec. Educ. Support Cost Per Pupil
.13	=	.13		= Total A.E.A. Spec. Educ. Support Cost Per Pupil
.14	X	.14		X Total Weighted Enrollment (Line 1.10)
.15	=	.15		= Total A.E.A. Spec. Educ. Support District Cost
		3.0		A.E.A. MEDIA AND OTHER SERVICES DISTRICT COST CALCULATION:
.1		.1		Total Media Cost Per Pupil (For 1978-79)
.2	+	.2		+ Total Other Services Cost Per Pupil (For 1978-79)
.3	=	.3		= Total Media & Other Services Cost Per Pupil
.4		.4		Budget Year Enrollment (Line 1.2)
.5	+	.5		+ Add Resident Non-Public Students
.6	=	.6		= Total Enrollment Served
.7	X	.7		X Total Media & Other Services Cost Per Pupil (Line 3.3)
.8	=	.8		= Total A.E.A. Media & Other Services District Cost
		4.0		MAXIMUM TOTAL BUDGET CALCULATION:
.1		.1		Total Regular Program District Cost (Line 2.6)
.2	+	.2		+ Total Special Education Instruction District Cost (Line 2.9)
.3	+	.3		+ Total A.E.A. Spec. Educ. Support District Cost (Line 2.15)
.4	+	.4		+ Total A.E.A. Media & Other Services District Cost (Line 3.8)
.5	+	.5		+ Estimated Additional Growth to be Allowed by S.B.R.C.
.6	=	.6		= Grand Total District Cost (Controlled Budget)
.7	+	.7		+ Estimated Unspent Balance from the 1977-78 Authorized Budget
.8	+	.8		+ Estimated Miscellaneous Income for the 1978-79 Budget Year
.9	+	.9		+ Estimated Use of Secretary's Balance to be Allowed by S.B.R.C.
.10	+	.10		+ Approved Additional Enrichment
.11	=	.11		= Total Estimated Maximum Budget for 1978-79

* 2.4 on 77-78 Printout
** 2.13 on 77-78 Printout

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DEA EXHIBIT _____

DOLLARS AVAILABLE FOR CONTRACT SETTLEMENT (FY 1978-79)

New monies generated by school Aid Formula $1458 p/p	$1,607,832	
$1480 p/p		$2,098,168
Staff Reduction (Bargaining Unit) 57 positions (District's figure on salaries + 20% for fringe benefits)	987,600	
Reduction of 3 Associate Principals	80,000	
Special Levy (liability and unemployment)	242,000	
Turnover savings	37,563	
Additional budget cuts by Board action	649,500	
TOTAL	$3,604,495	$4,094,831

APPENDIX A

STRUCTURE FOR A GOOD EXHIBIT

Average Salary for Nonadministrative Personnel
Top 10 school districts in Iowa
1975-76

← TITLE - simple statement of exhibit. Tells what exhibit covers.

School District	Average Salary
Ames	$ 12,865
Bettendorf	12,824
Mason City	12,533
Pleasant Valley	12,501
Des Moines	12,527
Davenport	12,231
Iowa City	12,094
Clinton	11,941
Sheldon	11,805
Saydel	11,776

← HEADINGS - identification of specific areas.

← DATA - should be simple and easy to understand.

The average nonadministrative salary for the top 10 school districts is $12,283.

← SUMMARY - short and to the point.

Sheldon's average is $11,805.
This is $478 below the average of the top ten.
This is $1,060 below the top average salary.
This ranks Sheldon 9th.

← CONCLUSION - statement of the EA concerning the information.

This exhibit is supportive data for contract provision ___ Article # ___.

← PURPOSE - ties information to the issue in dispute.

Source:

ISEA Research Unit 1975-76 Salary Schedules in Iowa Schools.

← SOURCE - verifies origin of data used.

APPENDIX B

COMPARISONS OF FINAL OFFERS
exchanged between
WILTON EDUCATION ASSOCIATION AND WILTON BOARD OF EDUCATION

ITEM	BOARD	ASSOCIATION	FACT-FINDER'S RECOMMENDATION
1. Base salary	$9600	* $9650	$9650
2. Salary schedule increments	Add 1 step to BA columns	Add 1 step to BA columns Add 1 step to MA columns	Add 1 step to BA columns Add 1 step to MA columns
3. Salary schedule columns	Add no columns	Add 1 MA column	Add 1 MA column
4. Dependent Health and major medical insurance premium	No payment of premiums	*Payment of 30% of dependent premium	Payment of 50% of dependent premium
5. Annuity Option	No payment	*Payment of equivalent dependent premium dollars (30%)	Payment of equivalent dependent premium dollars (50%)
6. Method of Paying Supplemental Duties	Flat dollar	% of BA Base	Flat dollar
7. Positions to be added to supplemental pay schedule	* Add: Jr. H. Asst. Football	* Add: Golf Jr. H. Asst. Football Fall Softball Drivers Education Summer Band	* Add: Golf Add if filled: Jr. H. Asst. Football Fall Softball Drivers Education Summer Band
8. Payment for Speech Position	Decrease 76-77 payment by $50	Increase 76-77 payment by $50	Decrease 76-77 payment by $50
9. Payment for asst. Jr.H. Football	*$450	*$350	Amount should be negotiated
10. Reopener	No reopener	Reopener	No reopener

*Compromise of position at fact-finding

APPENDIX C

RULES OF EVIDENCE IN HEARINGS

1. Fact finders/arbitrators are not bound by legal rules of evidence in their proceedings.

2. Most fact finding cases are conducted much more informally than arbitration or courtroom procedures.

3. A case conducted in the courtroom is generally a win - lose situation -- fact finding/arbitration grows out of collective bargaining and assumes a continuing relationship between the parties.

4. As a general rule, fact finders/arbitrators accept or listen to all evidence a party believes to be pertinent. However, the fact finder/arbitrator will decide what weight he/she sill give to a piece of evidence.

   Among factors taken into account by fact finders/arbitrators in deciding what weight will be given to certain pieces of evidence are:

   Do the statements ring true

   Is the witness credible

   Does the witness speak from first-hand knowledge

   Are these inconsistencies in the testimony

   Is the documentary evidence taken out of context

   Has need, ability to pay and comparability been proven

Not one of these factors by itself but all of them taken together determine how much weight or credibility a fact finder/arbitrator will give to evidence or witnesses.

NOTE! None of the factors relate to how just a particular party's position may be.

APPENDIX D

(Sample Letter for Budget Information)

Dear _____:

In order that we may intelligently prepare proposals for bargaining this year, we request that you supply the following financial information by September 15, 1978.

1. A copy of the 1977-78 school budget as originally proposed in (month if known) and as finally amended.
2. A copy of the proposed 1978-79 school budget.
3. A copy of the proposed 1979-80 school budget as soon as available.
4. A copy of the 1977-78 Secretary's Annual Report.
5. A copy of the Treasurer's Annual Report.
6. 1978-79 Cost per pupil.
7. Unspent balance from the 1977-78 school budget.
8. Estimated unspent balance - 1978-79 and sources.
9. A scattergram of the current placement of employees on the 1978-79 salary schedule.
10. The number of employees taking single health insurance and the number taking family coverage. The dollar premium cost to the District and to the employee for both single and family coverage.
11. Copy of monthly budget reports.

Thank you for your consideration in this matter.

Sincerely,

_____ _____

Chief Negotiator President

APPENDIX E

IMPASSE GUIDE
A Check List of Suggested Exhibits

( ) Optional

I. Pre - Hearing

_____ a. Tentative Agreements (Stipulate at Hearing)
_____ b. Present Master Contract (Stipulate at Hearing)
_____ c. Previous years Contracts (Stipulate at Hearing)
_____ d. Previous Fact-Finding and/or arbitration awards. (Stipulate at Hearing or introduce as exhibit during association presentation)
_____ e. Final offers of the Parties (Stipulate at Hearing)
_____ f. Impasse procedures - Local and/or Statutory (Stipulate at Hearing)
_____ g.
_____ h.
_____ i.

II. Hearing

A. Need and Comparability

_____ a. Opening Statement
_____ b. Items in dispute and positions of each Party (Local may wish to compare and contrast with existing language and/or recent award)
_____ c. C.P.I. vs B.A. Base
_____ (d) Local cost of living information - if available
_____ (e) Buying power study of hypothetical teacher - take home pay
_____ f. Introduction of comparison group (s) - with rationale (Local may wish to use athletic conference, geographic area, increasing enrollment schools, suburban schools, Bi-State comparisons, 100 mile radius, enrollment size, etc.)
_____ (g) Previous Fact-Finding and/or arbitration awards which substantiate comparison group
_____ h. B.A. Base and Final Step comparisons - present
_____ (i) M. A. Base and Final Step comparisons - present
_____ (j) Maximum Base and Final Step comparisons - present
_____ k. Salary comparisons - Historical (Base dollar or % increase, average teacher salary increase compared with group average or rank order within comparison group
_____ (l) Statewide Base comparison - Historical (Top 30, similar size, similar geographic and/or economic factors, etc.)
_____ m. Salary settlement comparisons - settlements to date. (Base and/or average teacher increases, if available, compared with group average or rank order)
_____ (n) Index comparisons - Present and/or Historical
_____ (o) Cumulative earnings - Present and/or Historical
_____ p.
_____ q.
_____ r.
_____ s.

B. Ability to Pay and Cost of Proposals

_____ a. Enrollment History
_____ b. Enrollment Projections
_____ c. Projected increase in controlled Budget
_____ d. Current cost of teacher salaries and % of controlled Budget with scattergram
_____ e. Projected cost of teacher salaries and % of estimated controlled Budget with scattergram
_____ f. Turnover and Lane Change - Historical savings
_____ g. Cost of Salary proposal and percent of controlled Budget
_____ h. Historical percent of controlled Budget spent for salaries
____ (i) Historical per cent of Budget spent for teacher salaries compared to State averages
____ (j) Cost of proposal as a percent of new monies
____ (k) Comparison of salary costs with placement of teachers on comparison group salary schedules
_____ l. Budget analysis by accounts or categories with emphasis on overestimates - Historical
_____ m. Comparison of General Fund Budget increases to amount of money spent on teacher salaries
_____ n. Closing Statement
_____ o.
_____ p.

APPENDIX F

BEFORE THE ARBITRATOR

James W. Jett, Esq.

IN THE MATTER OF ARBITRATION BETWEEN WESTWOOD EDUCATION ASSOCIATION and WESTWOOD COMMUNITY SCHOOL DISTRICT	OPENING STATEMENT

STATEMENT OF THE CASE

The Westwood Education Association is the certified employee organization for professional employees in the Westwood Community School District, which has its administrative offices in Sloan, Iowa. As the certified exclusive bargaining agent, the Westwood Education Association represents fifty-one (51) bargaining unit members who are full or part-time employees. Forty-six (46) of these bargaining unit members are also members of the Association.

In September 1977 and pursuant to Section 16 of the Public Employment Relations Act of 1974, the Westwood Education Association requested that negotiations commence for the 1978-1979 contract. Subsequently, approximately four (4) bargaining sessions took place.

On or about December 12, 1977, the Westwood Education Association declared an impasse to exist under Section 20 of the Public Employment Relations Act.

The Public Employment Relations Board appointed a mediator, Mr. Cecil Utterback. One (1) mediation session took place on January 9, 1978 without a complete agreement having been reached. One (1) informal negotiations session took place after mediation.

Subsequently, and in accordance with the parties' mutual agreement to proceed directly to arbitration, the Public Employment Relations Board supplied the parties with a list of arbitrators, from which

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list an arbitrator, Mr. James W. Jett, was selected by the striking process. The date of February 17, 1978 was mutually agreed upon as the date for the arbitration hearing.

STATEMENT OF THE ISSUES

The Association and Board have resolved all issues except the following:

Salary Base and Schedule
Minimum Increase for Off-Schedule Personnel
Wages and Salary Language - i.e.,in so far as adjustment is necessary to accomodate the parties' positions
Supplemental Pay Schedules: Appendices B and C
Insurance - Major Medical

ASSOCIATION CONTENTIONS

WAGES & SALARY LANGUAGE:

The Association contends that the contract language on Wages and Salary should be awarded according to the award on Salary Base and Schedule. (The portion of language "boxed in" on the Board proposal has been agreed to - i.e., escalator language. It was also understood by the Association that eight (8) years credit on the Salary Schedule had been agreed by the parties.)

Therefore, should the arbitrator decide for the Association, our contention is that current language (except as in parentheses above) should also be awarded.

SALARY BASE & SCHEDULE:

The fundamental Association contention is that the current (1977-1978) percentage ratio-i dex schedule should be retained since there is no good cause justify ng its dis-continuance! Further, it is the Association's belief that the burden of proof for the necessity of and/or good cause for the removal of the current ratio-index percentage schedule rests with the Board.

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In light of, and in addition to, this fundamental contention, the Association intends to show the following:

I: STATUS QUO (and COMPARABILITY):

A. That the ratio-index schedule has been past practice in the Westwood Community School District over a period of years - both before and after formal collective bargaining.

B. That a ratio-index schedule is typical of wage patterns in comparable school districts in the geographic area.

C. That the current ratio-index when combined with the Association's base proposal will result in a wage raise comparable with other area and state-wide settlements.

II: NEED:

A. That retention of the ratio-index schedule is necessary in order to maintain staff (bargaining unit) morale.

B. That retention of the ratio-index schedule is necessary in order to retain experienced staff within the system.

C. That the District (Board) will be unable to show their purported inability to hire employees with the current ratio-index schedule.

D. That due to declining enrollment and therefore limited budgetary resources, the District is in fact reducing staff - i.e., filling vacancies with other than laid-off employees with recall rights is not a problem.

E. That the Board's proposal is, in fact, divisive in nature due to its inherent characteristics - vast inequities in treatment of bargaining unit personnel, and separate schedules for new and returning employees.

III: ABILITY TO PAY:

A. That the Westwood Community School District has the ability to pay is undisputable due to the nature and cost of its proposal.

B. That the Westwood Community School District will possess adequate funds to provide the Association's proposal.

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The Association's contentions are to a great degree borne out by the fact that, following Board distribution of a list of individuals, their salaries under the Board proposal, and their salaries under the Association proposal, a meeting and vote of the bargaining unit membership gave unanimous support to the Association's position in this arbitration hearing.

CAREER INCREMENT (MINIMUM INCREASES FOR OFF-SCHEDULE PERSONNEL):
The basic purpose of a career increment is to reward those individuals whose experience has out-stripped the steps on the schedule, thus providing them with a raise more nearly approaching the rising cost-of-living.
Together with the Association's proposal on Salary Base and Schedule, the Association proposal of a minimum $500 career increment will provide an appropriate raise for these people.

SUPPLEMENTAL PAY SCHEDULE(S):
The basic Association contention(s) of the Salary Base and Schedule item are also applicable here. Current practice is to provide a percentage supplemental schedule (C) for coaching and related activities, with a flat amount is provided for ticket taking, bus chaperoning and other similar activities in Schedule D.

Elimination of the current percentage schedule (Schedule C) would result in the same kinds of problems itemized in Salary Base and Schedule.

The Association proposal of a one (1) percent increase in the scheduled amounts will suffice to meet the needs of bargaining unit members. It will also eliminate the need for renegotiation of this area annually because it provides an automatic adjustment of amounts in line with the base raise.

The Board proposal, on the other hand, again appears advantageous - in the short term. However, it does not provide for automatic adjustment and eliminates a benefit at least in so far as morale is concerned.

-more-

INSURANCE:

The Association's basic contention in the area of insurance is that the assumption of collective bargaining, although unwritten, is that the process will result in increased employee benefits - not a lessening of benefits. Thus the Association has proposed an increase in funds for insurance equal to the insurance company's projections of cost increases for providing current benefit coverage levels.

The Board proposal would not only fail to meet the rising costs of the coverage currently provided and thus, in fact, reduce the employee benefits in this area, it would also reduce current funds - clearly a reduction of benefits.

CONCLUSION

The Association contends that the purpose of collective bargaining and the creation of a Master Contract is to stabilize the employment relationship by binding both the parties to the terms and conditions of the Contract. Further, the Association contends that the assumed result of collective bargaining is improvement in the employee's working conditions and benefits.

The Association also contends that the Association's proposals in the areas at impasse do not reduce employee benefits but rather improve them - and that the Association's proposals in the areas at impasse continue current employment stability as well as projecting that stability into the future through the Contract.

However, the Association further contends that the Board's proposals do not, in fact, consistantly improve employee benefits. While the Association admits that in some areas the Board proposals may provide some short term financial advantage - even more than do those of the Association - it maintains that the destruction of employment stability which would be caused by incorporation of the Board proposals is far more important to the bargaining unit members and to the entire employment situation - as well as creating considerable uncertainty in regard to long term prospective benefits. The bargaining unit members concur.

Therefore, the Association respectfully requests that the arbitrator issue his decision and award for the Association proposals on all items at impasse.

TABLE 13
UNIVERSITY OF NORTHERN
IOWA FACTFINDING
EXHIBIT

Academic Year	Adjusted Mean* Faculty Compensation	CPI**	Adjusted mean for CPI compensation + 3% Productivity Gain
1967-68	$11,685	100	-----
1968-69	$12,035	104.2	$12,525
1969-70	$12,396	109.8	$13,541
1970-70	$12,768	116.3	$14,672
1971-72	$13,151	121.3	$15,640
1972-73	$13,546	125.3	$16,502
1973-74	$13,952	131.1	$17,586
1974-75	$14,371	147.7	$19,944
1975-76	$14,802	161.2	$21,953
1976-77	$15,246	172***	$23,659

*Adjusted for 3% productivity Gain.
**Based on academic & not calendar year.
***Estimated

TECHNICAL NOTE

Adjusted average compensation plus the CPI adjustment computation:

Let $\bar{x}$ compensation at UNI in 1967-68 = X

Xadj = [productivity ADJ conpensation] + CPI change

$$Xadj = X\ (1.03)^N + X\ (CPI_N) - X$$

$$Xadj = X\ [(1.03)^N + (CPI_N) - 1]$$

Correcting for unwarranted conpensation differences between UNI and, Iowa State and the University of Iowa.

FACTS: Both Iowa State and the University of Iowa are Class I schools in AAUP data and UNI is a Class II A school.

Average compensation in public institutions nationwide for AAUP data

Class I	$21,110
Class II	$19,780

(The difference is $1,330.00 or 0.0672 using Class II A as the base or 0.063 using Class I as the base).

Average Compensation in Public Institutions in Iowa.

Class I	University of Iowa	$22,110
	Iowa State	$20,380
	Weighted Average (by number of faculty)	$21,219
Class II A	University of Northern Iowa	$18,762

*1975-76 AAUP data, Survey Issure, Aug, 1976.

(Using the weighted average, the difference is $2,457.00 or 0.13 using UNI (Class II A) as the base, or 0.1157 using the weighted Iowa Class I average).

In the Nationwide data, the Class II A average compensation is 0.9369 of the Class I average compensation applying this to UNI and using the weighted Iowa Class I average compersation, the UNI average compensation should be $19,880.00. The difference between this standard and the UNI data is $1,118.00.

In Public Institutions USA

Class II A $19,780 = 0.9369
Class I $21,110

0.9369 X $21,219.00 = $19,880.03

Where $21,219 is the weighted Iowa Class I average gaculty compensation; and $19,880.08 becomes the "Standard" Class II A average compensation, for Iowa.

The Standard Class II A compensation in Iowa	$19,880.08
minus UNI's average compensation	$18,762.00
difference in $	$ 1,118.03

The $ difference times number of faculty will yield the total number of dollar required to correct the difference, ie:

$1,118.08 X 528 = $590,346.24

PRODUCTIVITY OF THE FACULTY AS IMPLIED
BY CHANGES IN THE COMPOSITION

1975-76	126	13.8%	140	26.5%	206	39.0%	56	10.6%	528
1974-75	118	22.9%	137	26.6%	204	39.6%	56	10.8%	515
1973-74	105	21.0%	127	25.5%	204	40.9%	62	12.4%	498
1972-73	105	21.0%	113	22.6%	213	42.7%	67	13.4%	498
1971-72	102	20.3%	99	19.7%	218	43.4%	83	16.5%	502
1970-71	98	19.7%	96	19.3%	215	43.2%	88	17.7%	497
1969-70	93	19.4%	79	16.5%	181	37.9%	124	25.9%	477
1968-69	85	18.1%	74	15.8%	172	36.7%	137	29.2%	468
1967-68	80	18.2%	67	15.2%	158	35.9%	134	30.5%	439
1966-67	73	18.8%	63	16.2%	139	35.8%	113	29.1%	388

Where P = Full Professor
P = Assoc.
P = Asst.
P = Inst.
$P = P_1 + P_2 + P_3 + P_4$

	UNI Average compensation Unadjusted	UNI are compensation adjusted for Δ CPI	CPI Index	(1)/(2) Ratio	P_1/P	P_2/P	P_3/P	P_4/P
1967-68	$11,685		100	1.0				
1968-69	$12,285	12,175.77	104.2	1.0+	0.18	0.158	0.367	0.292
1969-70	$13,079	12,830.13	109.8	1.01	0.144	0.165	0.379	0.259
1970-71	$13,934	13,589.65	116.3	1.025	0.197	0.193	0.43	0.17
1971-72	$14,192	14,173.90	121.3	1.0+	0.20	0.197	0.43	0.16
1972-73	$14,750	14,641.30	125.3	1.0+	0.21	0.226	0.42	0.13
1973-74	$15,427	15,319.03	131.1	1.0+	0.21	0.25	0.40	0.12
1074-75	$16,606	17,258.74	147.7	0.96	0.229	0.26	0.39	0.10
1975-76	$18,762	18,836.22	161.2	0.99	0.238	0.265	0.39	0.10
1976-77		20,098.20	172		*			
1977-78		21,383.55	183					
	(1)	(2)	(3)	(4)				

Includes no adjustment for productivity gains

Faculty Comp osition
P=Total Faculty
P_1= Full Professor
P_2= Associate Professor
P_3= Assistant Professor
P_4= Instructor

*32% increase in Full Professors
** 67.7% increase in Associate Professors

The argument here is the faculty composition was changed in favor of maturity and experience. From here, our "productivity" apparently is increasing on the average.

APPENDIX A

STRUCTURE FOR A GOOD EXHIBIT

Sample Exhibit _____
Label-Who prepared and number of exibit.

Average Salary for Nonadministrative Personnel ← TITLE - simple statement of exhibit. Tells what exhibit covers.
Top 10 school districts in Iowa
1975-76

School District	Average Salary
Ames	$ 12,865
Bettendorf	12,824
Mason City	12,533
Pleasant Valley	12,503
Des Moines	12,527
Davenport	12,231
Iowa City	12,094
Clinton	11,941
Sheldon	11,805
Saydel	11,776

← HEADINGS - identification of specific areas.

DATA - should be simple and easy to understand.

The average nonadministrative salary for the top 10 school districts is $12,283 ← SUMMARY - short and to the point.

Sheldon's average is $11,805.
This is $478 below the average of the top ten.
This is $1,060 below the tope average salary.
This ranks Sheldon 9th.

← CONCLUSION - statement of the EA concerning the information.

This exhibit is supportive data for contract provision _____ Article _____. ← PURPOSE - ties information to the issue in dispute.

Source: ← SOURCE - verifies origin of data used.

ISEA Research Unit 1975-76 Salary Schedules in Iowa Schools.

Some Contrasts 1966-67 to 1975-76

1. The number of Full Professors increased by 72.6%, while the size of the faculty increased 36%.

2. The number of Associate Professors increased by 122% while the faculty increased by 36%.

3. The number of Assistant Professors increased 48%.

4. The number of Instructors decreased 50%.

AVERAGE RANKS OF UNI FACULTY MEMBERS

	AVERAGE RANK*		
1975-75	2.636		
1974-75	2.615	> 0.008	
1973-74	2.552	> 0.0246	Arithmetic mean Change of 1.7% in Average faculty Rank
1972-73	2.514	> 0.015	
1971-72	2.438	> 0.031	
1970-71	2.410	> 0.0116	
1969-70	2.295	> 0.05	
1968-69	2.228	> 0.03	
1967-68	2.211	> 0.0076	
1966-67	2.247	> 0.016	

* Where $W(P_1) = 4$ is the weight of Full Profs.
$W(P_2) = 3$ is the weight of Assoc. Profs.
$W(P_3) = 2$ is the weight of Asst. Profs.
$W(P_4) = 1$ is the weight of Instructor.

$$\text{Average Rank} = \frac{4(P_1) + 3(P_2) + 2(P_3) + 1(P_4)}{P_1 + P_2 + P_3 + P_4}$$